



AC Ideas Ultimate Component User Guide

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Overview

AC Ideas Ultimate is a new, completely redesigned Salesforce Ideas Management app for Experience Cloud.

It will make the process of gathering insights on products and services clear, put the brightest ideas into development, and get the most precious feedback from your customers.

Do your customers want to suggest something new? Would they like to improve something they already use? This component is what you need. Engage your customers within a community and let them generate new and unique ideas using AC Ideas Ultimate.

Main features:

- Native to Salesforce Lightning Experience
- Ideation Dashboard for Visualizing Ideas
- Idea Campaigns
- Chatter Support
- Categories Hierarchy
- Email Updates
- Ideas Subscription
- Merging Ideas
- Status Color Assigning
- Zone Settings
- Filters and Advanced Search
- Reputation Support
- Status Auto-Update
- Ideas Moderators
- Moderation Rules
- Official Answer
- Custom Fields Support

Installation

Prerequisites:

- Digital Experiences should be enabled in setup:

(Setup – Quick Find / Search box – Digital Experiences – Settings - Enable Enable Digital Experiences – Domain name – Save)

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'Digital Experiences' entered. Below it, a navigation menu shows 'Feature Settings' expanded, with 'Digital Experiences' selected. Under 'Digital Experiences', 'Settings' is highlighted. The main content area is titled 'Experiences' and contains the following sections:

- Enable Digital Experiences**: A section with a 'Save' button at the top right. Below the title, it says: 'After you enable digital experiences in your org, you must still create, configure, customize, and then activate a site before it's live and available to users.' There is a checkbox labeled 'Enable Digital Experiences' which is checked and highlighted with a red box.
- Select a domain name**: A section with an 'Important' note: 'The domain name is used in all of your digital experiences and can't be changed after you save it.' Below this, it shows 'Sample Experience URLs' for a 'Sample Domain Name' 'MyCompany.eu40.force.com':
 - MyCompany.eu40.force.com/customers
 - MyCompany.eu40.force.com/developers
 - MyCompany.eu40.force.com/partners
- Domain Name**: A text input field containing 'advancedcommunities' followed by '-developer-edition.eu40.force.com'. There is a 'Check Availability' button to the right of the input field. A 'Save' button is at the bottom right of this section.

- At least one SF Community should be configured
- Internal org domain required (Setup – Company Settings – My Domain)

Install AC Ideas Ultimate from the AppExchange or use the direct installation link if you have one.

Configuration

Set up Permissions

AC Ideas Ultimate component comes with custom objects and fields. In order for the component to function properly, you need to provide appropriate access to these objects and their fields.

You can provide access in two ways:

- Assign a user an appropriate permission set that comes with the package:

AC Ideas Ultimate Admin for admins or moderators

AC Ideas Ultimate User for community users

AC Ideas Ultimate Guest User for guest users

- set up User Profile according to the permissions below:

Organization-Wide Defaults (Default External Access):

AC Idea - Public Read Only

Idea Campaign - Public Read Only

Idea Category - Public Read Only

Idea Flag - Private

Ideas Moderator - Private

Idea Status - Public Read Only

Idea Subscription - Public Read Only

Idea Zone - Public Read Only

Status Update Rule - Public Read Only

App permissions (admin):

AC_Ultimate_Ideas: Visible

Tabs permissions (admin):

AC Ideas - Default On

Ideas Settings - Default On

Ideas Moderators - Default On

Ideas Categories - Default On

Ideas Flags - Default On

Idea Statuses - Default On

Ideas Zones - Default On

Objects and Fields	Ideas Ultimate Admin	Ideas Ultimate User	Ideas Ultimate Guest
AC Ideas	Read, Create, Edit, Delete, View All, Modify All	Read, Create	Read
AC Idea	Read, Edit	Read	Read
Archived	Read, Edit	Read	Read
Comment Count	Read, Edit	Read, Edit	Read
Description	Read, Edit	Read, Edit	Read
Effort	Read, Edit	Read	Read
Effort Value	Read	Read	Read
Idea Campaign	Read, Edit	Read	Read
Idea Status	Read, Edit	Read	Read
Is Visible For Guests	Read, Edit	Read	Read
Jira Issue	Read	Read	-
Kanban Path	Read, Edit	Read, Edit	-
Official Answer	Read, Edit	Read	Read
Official Answer Date	Read, Edit	Read	Read
On Moderation	Read, Edit	Read	Read
Status Name	Read	Read	Read
Vote Score	Read	Read	Read
Vote Total	Read	Read	Read
Zone Name	Read	Read	-
Idea Campaigns	Read, Create, Edit, Delete, View All, Modify All	Read	Read
Campaign Manager	Read, Edit	Read	Read
Color	Read, Edit	Read	Read
Comment Points Amount	Read, Edit	Read	Read
Description	Read, Edit	Read	Read
Is Active	Read	Read	Read
Is Visible For Guests	Read, Edit	Read	Read
Post Points Amount	Read, Edit	Read	Read
Url Parameter	Read	Read	Read
Vote Points Amount	Read, Edit	Read	Read
Idea Categories Zones Junction	Read, Create. Edit Delete, View All, Modify All	Read	-
Idea Campaign	Read, Edit	Read	Read
Idea Category Campaign Junction	Read, Create. Edit Delete, View All, Modify All	Read	Read
Idea Categories	Read, Create. Edit Delete, View All, Modify All	Read	Read
Is Visible For Guests	Read, Edit	Read, Edit	Read

Order	Read, Edit	Read	Read
Parent Category	Read, Edit	Read	Read
Zones	Read, Edit	Read	Read
Idea Categories Junction	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	-
Ideas Flags	Read, Create, Edit, Delete, View All, Modify All	Read, Create	-
AC Idea	Read, Edit	Read, Edit	-
Flag Message	Read, Edit	Read, Edit	-
Idea Title	Read	Read	-
Idea Moderators	Read, Create, Edit, Delete, View All, Modify All	-	-
Categories	Read, Edit	-	-
Moderator	Read, Edit	-	-
Ideas Statuses	Read, Create, Edit, Delete, View All, Modify All	Read	Read
Is Visible For Guests	Read, Edit	Read, Edit	Read, Edit
Order	Read, Edit	Read	Read
Type	Read, Edit	Read	Read
Ideas Statuses Zones Junction	Read, Create, Edit, Delete, View All, Modify All	Read	Read
Idea Subscription	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	-
AC Idea	Read, Edit	Read, Edit	-
User	Read, Edit	Read, Edit	-
Ideas Zones	Read, Create, Edit, Delete, View All, Modify All	Read	Read
Account	Read, Edit	Read	-
Active	Read, Edit	Read	Read
Ideation Manager	Read, Edit	Read	-
Is Visible For Guests	Read, Edit	Read	Read
Idea Votes	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read
Score	Read	Read	Read
Voter	Read, Edit	Read, Edit	Read
Status Update Rules	Read, Create, Edit, Delete, View All, Modify All	Read	-
Idea Status	Read, Edit	Read	-
New status	Read, Edit	Read	
Sync Kanban Paths	Read, Create	-	-
Sync Ideas by Jira Statuses	Read, Create	-	-

Apex Classes Access

According to the Salesforce access restriction to @AuraEnabled Apex Methods for Guest and Portal Users, provide access for external users (including guests) to the following Apex Classes:

```
acideasULT.brConfig  
acideasULT.brCustomCategoriesController  
acideasULT.brDataSelector  
acideasULT.brDataSelectorHelper  
acideasULT.brEmailNotification  
acideasULT.brErrorHandler  
acideasULT.brFieldSetMemberListFactory  
acideasULT.brFieldWrap  
acideasULT.brFilesManager  
acideasULT.brGlobalInfoController  
acideasULT.brGlobalSearchResultController  
acideasULT.brIdeaByJiraIssueSyncBatch  
acideasULT.brIdeaByJiraIssueSyncScheduler  
acideasULT.brIdeaCampaignController  
acideasULT.brIdeaCampaignTriggerHandler  
acideasULT.brIdeaCategoryTriggerHandler  
acideasULT.brIdeaCreateFormController  
acideasULT.brIdeaCustomFieldsDynamicPicklist  
acideasULT.brIdeaDeleteController  
acideasULT.brIdeaDetailsController  
acideasULT.brIdeaEditController  
acideasULT.brIdeaFormController  
acideasULT.brIdeaMergeController  
acideasULT.brIdeasCommentsManager  
acideasULT.brIdeasCommonSettingsController  
acideasULT.brIdeasDashboardManager  
acideasULT.brIdeaSecurityException  
acideasULT.brIdeasListController  
acideasULT.brIdeasListFilterController  
acideasULT.brIdeasListItemController  
acideasULT.brIdeasManager  
acideasULT.brIdeasModerationSettingsController  
acideasULT.brIdeasModerationUtils  
acideasULT.brIdeaStatusController  
acideasULT.brIdeaSubscriptionUtils  
acideasULT.brIdeasZoneSettingsController  
acideasULT.brIdeaTriggerHandler  
acideasULT.brIdeaUnsubscribeController  
acideasULT.brIdeaVotesListController  
acideasULT.brIdeaVotingUtils  
acideasULT.brIdeaWrap  
acideasULT.brIFieldWrap  
acideasULT.brJiraApi  
acideasULT.brJiraApiCalloutsMock  
acideasULT.brJiraIntegrationSettingsController  
acideasULT.brJiraIssuesManager  
acideasULT.brKanbanPathByIdeaStatusSyncBatch
```

acideasULT.brKanbanPathManager
acideasULT.brLexIdeasController
acideasULT.brLexIdeasSettingsController
acideasULT.brLookupFieldController
acideasULT.brMetadataManager
acideasULT.brNetwork
acideasULT.brPreviousCampaignsController
acideasULT.brRelatedIdeasListController
acideasULT.brReportsDynamicPicklist
acideasULT.brReputationUtils
acideasULT.brSecurity
acideasULT.brSecurityException
acideasULT.brSendEmailManagerController
acideasULT.brStatusUpdateRulesController
acideasULT.brStatusUpdateRuleTriggerHandler
acideasULT.brTestDataFactory
acideasULT.brTestException
acideasULT.brTestFieldWrap
acideasULT.brTestUtils
acideasULT.brUserDisplayNameController
acideasULT.brUserInfoController
acideasULT.brUtils
acideasULT.brZoneFormController

To set Apex class security from a profile:

- From Setup, enter Profiles in the Quick Find box, then select **Profiles**.

We recommend using the Enhanced Profile User Interface to see the full list of available Apex classes!

- Select a profile.
- In the Apex Class Access page or related list, click **Edit**.
- Select the Apex classes that you want to enable from the Available Apex Classes list and click **Add**.

Profile
Customer Community Plus User

Find Settings... | Clone | Edit Properties

Profile Overview > **Apex Class Access**

Apex Class Access Save Cancel

Available Apex Classes		Enabled Apex Classes
ChangePasswordController	Add ▶	acideasULT.brCustomCategoriesController
ChangePasswordControllerTest		acideasULT.brCustomCategoriesControllerTest
CommunitiesLandingController	Remove ◀	acideasULT.brDataSelector
CommunitiesLandingControllerTest		acideasULT.brDataSelectorHelper
CommunitiesLoginController		acideasULT.brDataSelectorHelperTest
CommunitiesLoginControllerTest		acideasULT.brDataSelectorTest
CommunitiesSelfRegConfirmController		acideasULT.brEmailNotification
CommunitiesSelfRegConfirmControllerTest		acideasULT.brEmailNotificationTest
CommunitiesSelfRegController		acideasULT.brErrorHandler
CommunitiesSelfRegControllerTest		acideasULT.brFeedCommentTriggerHandler
ForgotPasswordController		acideasULT.brFeedCommentTriggerHandlerTest
ForgotPasswordControllerTest		acideasULT.brFeedItemTriggerHandler
LightningForgotPasswordController		acideasULT.brFeedItemTriggerHandlerTest
LightningForgotPasswordControllerTest		acideasULT.brFieldSetMemberListFactory
LightningLoginFormController		acideasULT.brFieldWrap

Custom Metadata Access

AC Ideas Ultimate uses Custom Metadata. To make this data visible for users on the community, provide them with the read access to the following custom metadata types:

acideasULT.Ideas Common Settings
acideasULT.Ideas Zone Settings

Only users with Customize Application permission can provide access to custom metadata types.

To grant a specific profile or permission set read access to custom metadata type:

1. Go to the profile or permission set that you want to grant access to.
2. Under Enabled Custom Metadata Type Access, click **Edit**.
3. Add the custom metadata type to the list of enabled custom metadata types.

Custom Metadata Types

Save

Cancel

Available Custom Metadata Types

abacus.Accounting Field Mapping

abacus.Accounting Mapping Set

acem.Chatter Group Setting

acem.Content Document Link Trigger Setting

acem.Event Settings

acem.Event Ticket Setting

acem.Google API General Setting

acem.Google Map Setting

acem.Google Places API Setting

acem.Guest Registration Setting

acem.Stripe API Setting

acem.Zoom API Setting

acem.Zoom to SF Timezone mapping

bedrock.Ideas Setting

Add

▶

◀

Remove

Enabled Custom Metadata Types

acideasULT.Ideas Common Setting

acideasULT.Ideas Zone Setting

Guest users

To make ideas visible to site guests, configure Guest User Record access using Sharing Rules (Setup - Sharing Settings) for the following objects:

- AC Idea
 - Additional Option - set “Include records owned by high-volume users” checkbox to true. It allows guest users to see ideas created by customer users.
- Idea Campaign
- Idea Categories
- Idea Status
- Idea Zone

Step 1: Rule Name

Label

Share with guests

Rule Name

Share_with_guests

Description

Step 2: Select your rule type

Rule Type

☐ Based on record owner
☐ Based on criteria
☒ Guest user access, based on criteria

Step 3: Select which records to be shared



This sharing rule grants access to guest users without login credentials. By modifying the default settings in accessing the site, even without logging in. To secure your site and its data from guest users, consider all the Salesforce isn't responsible for any exposure of your data to guest users related to this change from default

Criteria

Field	Operator	Value	
Is Visible For Guests	equals	True	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Add Filter Logic...

Additional Options

☒ Include records owned by high-volume users

Step 4: Select the users to share with

Share with

Cloud Software Site Guest User

Step 5: Select the level of access for the users

Access Level

Read Only

Ideas Settings

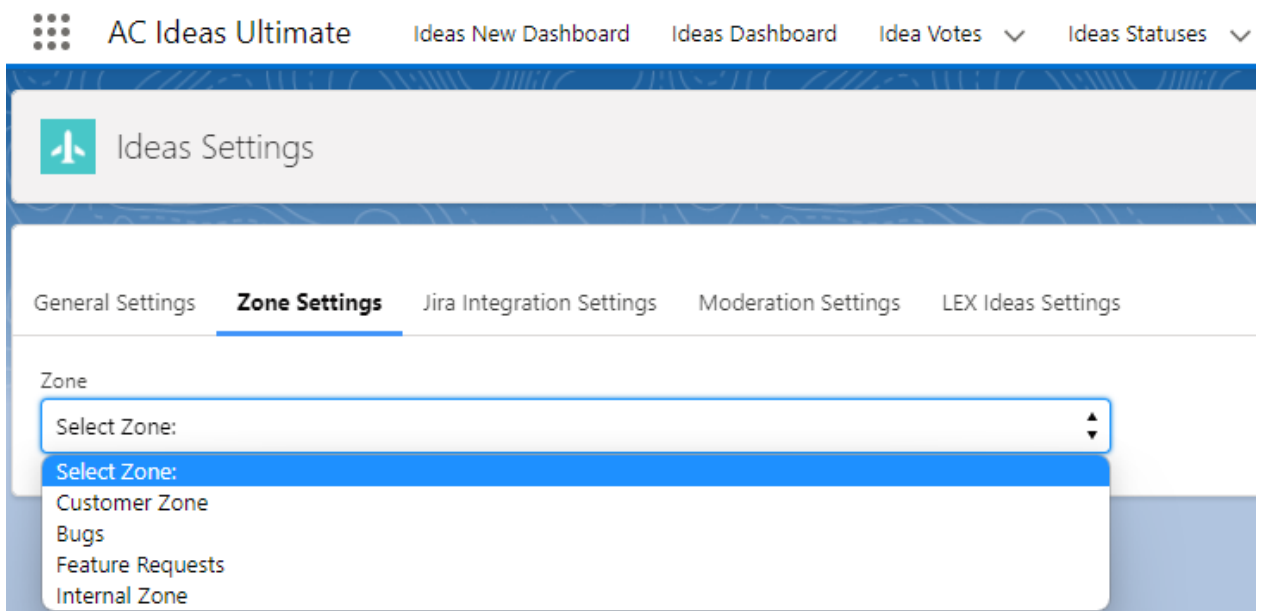
AC Ideas Ultimate is available for configuration in Lightning Experience only!

Choose the AC Ideas Ultimate App from the drop-down list of apps in the App Menu/App Launcher.

Nine main tabs cover different areas of Ideas management and configuration: Ideas Settings, Ideas Zones, Ideas Moderators, Ideas Categories, Ideas Statuses, Ideas Flags, Idea Campaigns, LEX Ideas, AC Ideas.

Ideas Settings tab includes five main sections of settings: Common Settings, Zone Settings, Jira Integration Settings, Moderation Settings and LEX Ideas Settings.

Note: Before making any changes, we recommend that you select the appropriate zone for which the settings will be applied.



General Settings

The Ideas Display section is used in case you want some additional custom fields to be displayed when creating an idea. Copy an API name of the created custom field set and paste it to this section.

IDEAS DISPLAY

Custom Field Set

acideasULTdev__New_Idea_Site

Custom LEX Field Set

acideasULTdev__New_Idea_Site

☐ Categories multi select enabled

☒ Ideas flagging enabled

Ideas Images Folder

☐ Ideas premoderation enabled

Available profiles

AC Community Test User

Analytics Cloud Integratio...

Analytics Cloud Security U...

Authenticated Website

Authenticated Website

Cascade Community User

Premoderation enabled profiles

System Administrator

NOTIFICATIONS

Organization-Wide Email Address

ideas@advancedcommunities.com

☒ Status change notification to subscribers

☒ Enable notifications for multiple communities

KANBAN PATH FOR IDEAS ⓘ

Sync Kanban Path by Idea Status

SUBSCRIPTION

☐ Idea's auto-subscription on commenting and voting

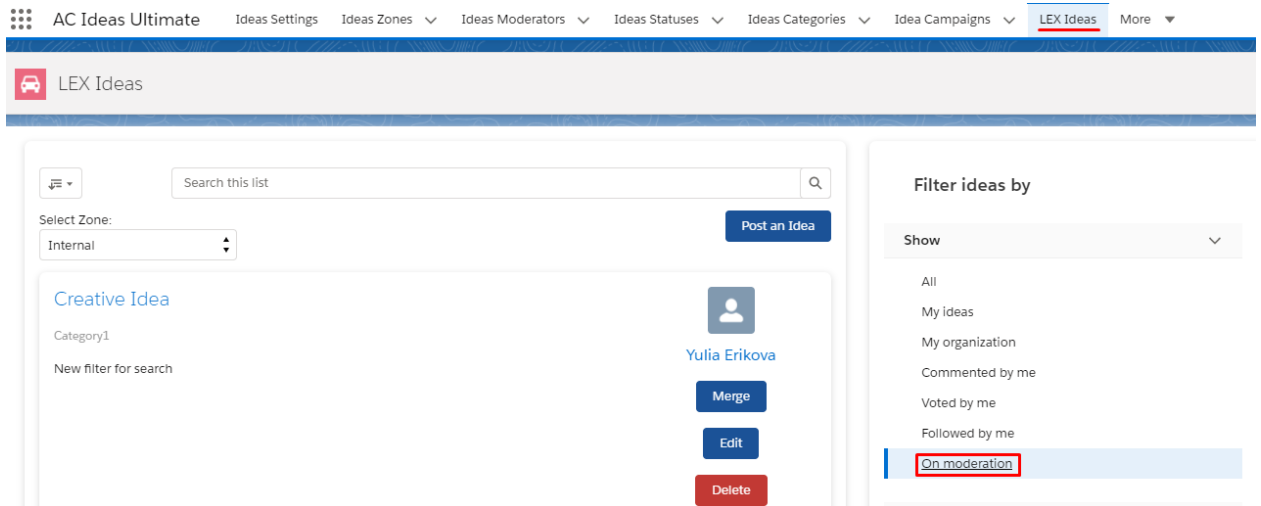
Save

Note: See how to create Custom Fields and Field Sets in the [Custom Field Settings](#) section.

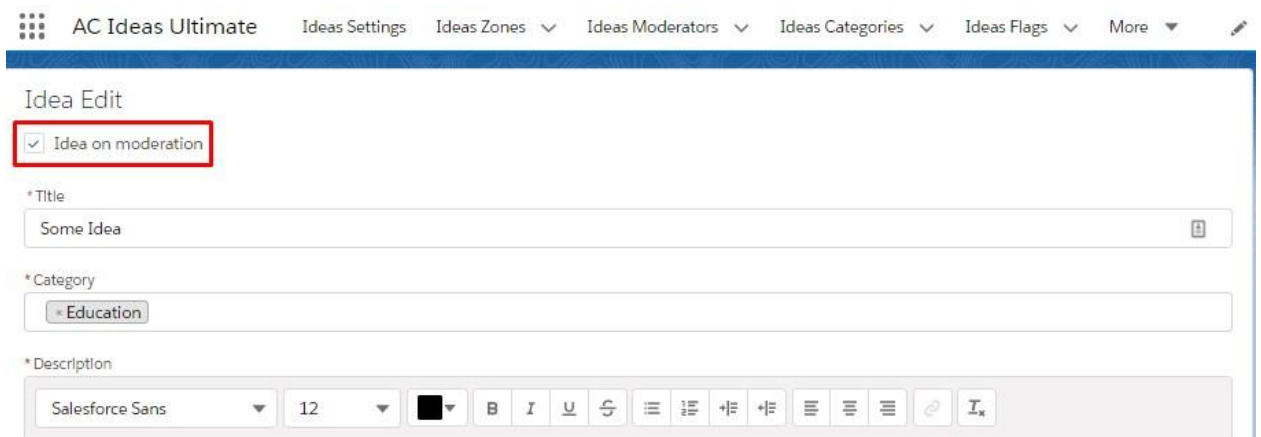
Here you can also enable/disable multiple choice of categories and ideas' flagging.

Enable Ideas Premoderation to save created ideas as a draft and select profiles for which ideas on moderation will be not visible.

The draft ideas will be visible within the “on moderation” section of the ideas list in your environment.



To make the idea publicly available, edit the idea and uncheck the “Idea on moderation” checkbox.



Notifications section defines Organization-Wide Email Address from which subscribers will be notified. If Organization-Wide Email Address is empty then the system will use a comment author as a sender.

To configure Org-Wide Email, go to Setup – Organization-Wide Email Addresses – create and copy the email address you want to be used as a sender – paste it to the appropriate field in the Ideas Settings – Common – Notification section.

Using this section, you can also enable/disable subscribers' notifications about ideas status updates and new comments.

If you have multiple communities using Ideas, enable notifications for multiple communities and set up email templates according to instructions in the [Configuration](#) section.

Kanban path for ideas

Please set up the Kanban first. See details [here](#)

Once you click the "Sync Kanban Path by Idea Status" button, the sync job will be started (and a toast message will appear). Once the job is finished - the button will be active again

Subscription. Enable Idea's auto-subscription on commenting and voting. By enabling this feature, users will be automatically subscribed to ideas on which they voted or commented.

Zone Settings

Zone Settings allow you to configure some component's features or idea's behaviour for certain zones individually.

Before editing any options for a specific zone you have to select the zone from the drop-down list for which the settings will be applied.

General Settings
Zone Settings
Moderation Settings
LEX Ideas Settings

Zone

External Idea Zone

FEATURES
Login page URL

☒ Allow displaying archived ideas
☒ Allow Owners edit their ideas
☐ Disable attachments
☐ Disable comments

Show Account Names

Disabled

VOTE LIMITS

☐ Disable voting
☐ Disable voting Down
☒ Allow users to change their votes
☒ Limit voting for Users from the same Account per one idea

* How many users from the same account may vote for one idea

6

☒ Disable vote for certain statuses

Available statuses

Submitted
Voting

Disabled vote statuses

Approved
Maybe later

REPUTATION
☒ Enable reputation support
Reputation points awarded to user on new Idea posting

100

Reputation points awarded to user on voting for Idea

10

Reputation points awarded to user on commenting on Idea

20

STATUS AUTO-UPDATE

	POINTS THRESHOLD	STATUS	NEW STATUS
1	60	Voting	Approved
2	70	Approved	Maybe later
+			

Save

Features

Login page URL - the URL of the login page with a form for user authorization in the Community

Allow displaying archived ideas - makes it possible for users to see ideas that were marked as archived

Allow Owners edit their ideas - when the checkbox is disabled owners can edit their ideas until someone votes or comments on them. If the checkbox is enabled, owners can always edit their ideas.

Disable attachments - disable the ability to attach file and images to ideas

Disable comments - hide all previous comments and disable the ability to add comments for all users

Show Account Names - picklist with the ability to choose "Show Idea Owners Account Name". If this value is set - The account name of the owner will be displayed next to the name/nickname. **Disable voting** - disable the ability to add votes for all users.

Disable voting Down - disable the ability to add downvotes for all users.

Allow users to change their votes - if the checkbox is checked - site users can cancel their votes (upvote/downvote) with the "Cancel vote" button. Note: It is not available to "Cancel Vote" on the merged child idea.

Limit voting for Users from the same Account per one idea - checkbox which is enabling vote limitation.

How many users from the same account may vote for one idea - the input number field. It is a required field if the vote limitation was switched on.

Disable voting for certain statuses - when the idea reaches the status which requires no more votes (e.g. *rejected* and *accepted*), enable the "Disable voting for certain statuses" checkbox. Then select the statuses from the available ones for which you need to block/stop voting.

Reputation

You can enable Community members' reputation support for ideas.

A community user's reputation can be configured by setting reputation rewards for three main Ideas actions: "post an idea", "post a comment" and "make a vote".

Status Auto-Update section is used to filter out the most popular ideas by status. You can create rules for the automatic update status. When the number of reputation points reaches the specified mark in the rule, the status will be updated to the other value specified in the rule.

To create auto-update status rules, do the following steps:

- Go to the App launcher – choose AC Ideas Ultimate – Ideas Settings – Zone Settings – Status auto-update item – click "+ New rule" button.

STATUS AUTO-UPDATE

	POINTS THRESHOLD	STATUS	NEW STATUS





- Fill in the fields:
 - In the required field “POINTS THRESHOLD” enter an integer (eg 20)
 - The Status field is not a mandatory value; if the intended Idea has not previously been assigned a status, then the field has to be left without a selected value.
There’s an exception if it only applies the rule to the Idea with the previously assigned status.
 - In the drop-down list of the mandatory “New status” field, select the intended status name for the change. Click Save.

STATUS AUTO-UPDATE

	POINTS THRESHOLD	STATUS	NEW STATUS
1	20	Choose status	Status A





You can delete / edit rules. The maximum number of rules created is 10. The created rules, without selecting zones, are applied to all zones without exception.

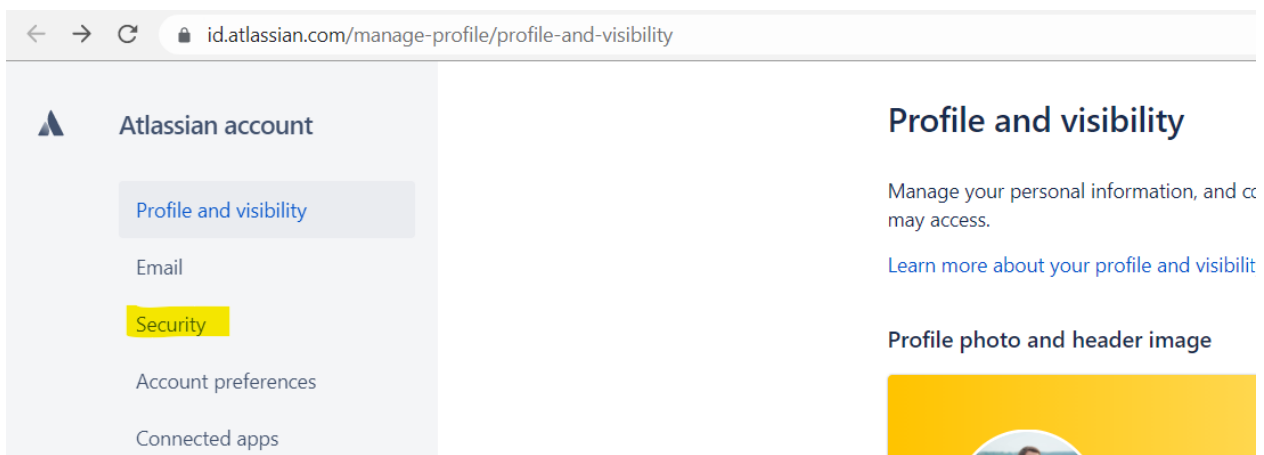
Jira Integration Settings

Jira Integration feature allows syncing Atlassian Jira issues with existing Ideas. With this functionality, Idea Managers may associate ideas with Jira issues and provide Site users with feature development status automatically.

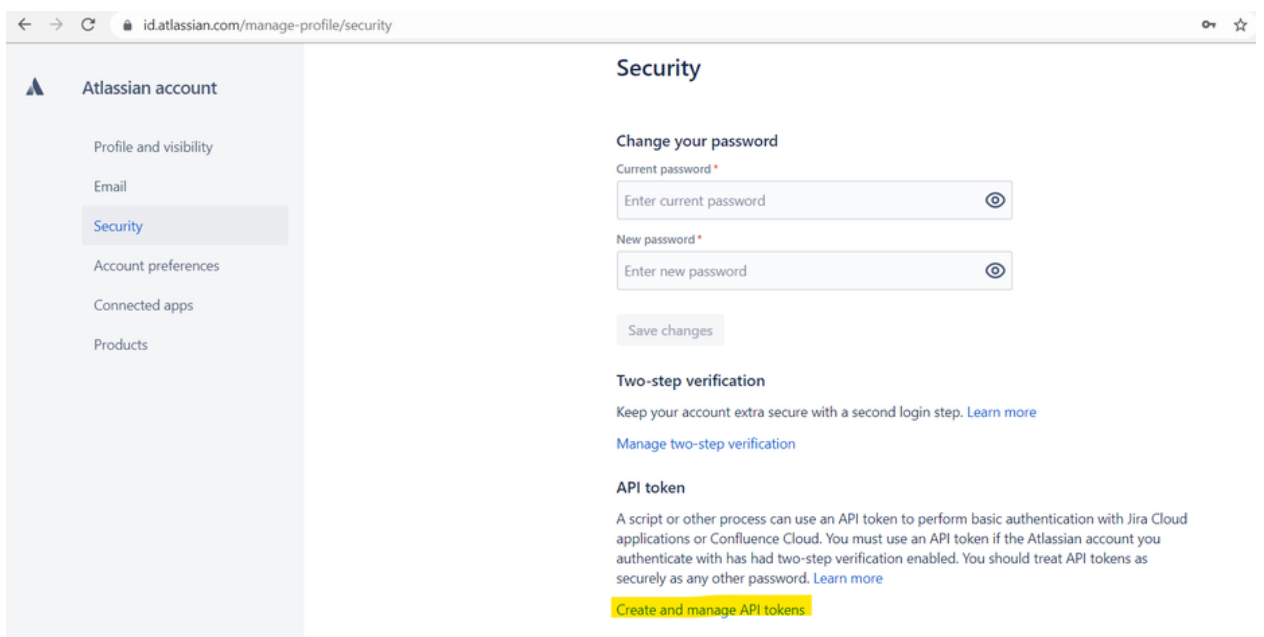
For this flow, the Event Manager/SF Admin /Jira admin should prepare Jira and Salesforce for integration:

Jira

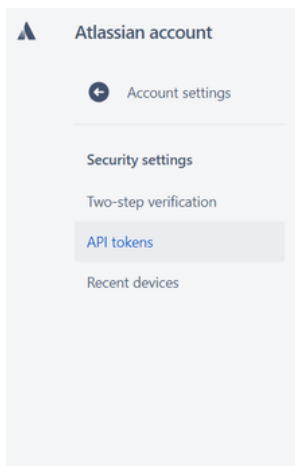
- Go to “Atlassian account” settings.
 The chosen Atlassian account must have access to the Jira issues that will be integrated with AC Ideas.
- Choose the “Security” page.



- Click the “Create and manage API tokens”.



- Click the “Create API token” button.



API Tokens

Your API tokens need to be treated as securely as any other password. You can only create a maximum of 25 tokens at a time.

Label	Last accessed	Action
-------	---------------	--------



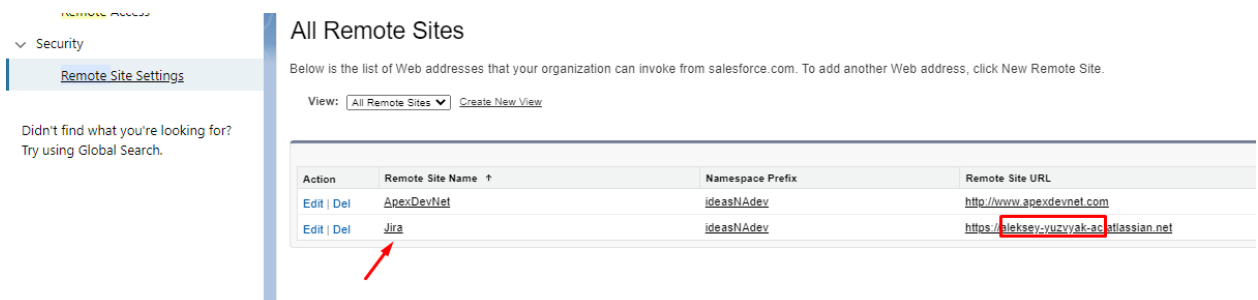
You don't have any API tokens

[Create API token](#)

- Name the token and copy the code. Once you close the modal window, you can't see the token again.

Salesforce

- Go to Setup → Remote Site Settings → New Remote Site → Name it and provide the URL of the Atlassian account.



- Go to the Ideas Settings → find the “Jira Integration Settings” tab.
- Check the “Activate synchronization of Ideas with Jira Issues Statuses” toggle. If the toggle is false - ideas will not be updated with Jira statuses.
- Provide Jira user's subdomain for Atlassian account, email and token.

AC Ideas Ultimate Ideas Dashboard Idea Votes Ideas Statuses Ideas Categories Idea Campaigns Ideas Settings

Ideas Settings

General Settings Zone Settings **Jira Integration Settings** Moderation Settings LEX Ideas Settings

JIRA INTEGRATION

[Synchronize Ideas with Jira Satuses now](#)

☐ Activate synchronization of Ideas With Jira Issues Statuses
Inactive

Provide User email and token for Jira account and subdomain of the Atlassian account (e.g. "yourdomain" from "https://yourdomain.atlassian.net")

domain-name

example@gmail.com

Jira Api key stored

Match Jira with Idea statuses

Jira Status	Idea Status	
Done	QA passed	X
Released	Released	X
Approved	Selected for development	X
		+

[Save](#)

- “Match Jira with Idea statuses” - these are matching fields for statuses. Status mapping is stored in the custom metadata.
 - Jira Status field - put Jira status name
 - This field value should be unique for the org. It is not allowed to assign one Jira status to two and more Idea statuses
 - Idea Status field - choose the idea status
 - It is a normal approach to assign several Jira statuses to the same Idea status
 - Click the Delete (X) button to remove the connection
 - Click the Add (+) button to add a new connection

If the label of the status was changed in Jira - mapping should be changed as well. If idea status was changed (renamed/deleted / unassigned from the zone) - mapping should be changed as well.

- Go to the AC Idea fieldset and add the “Jira Issue” field to the LEX fieldset.
- Go to Ideas you want to assign to certain Jira issues → Edit → Provide Jira ticket key (generally, looks like a combination of letters and numbers ABCDE-XYZ) in the “Jira Issue” field → Save.

AC Ideas External <a>New <a>Import <a>Change Owner <a>Printable View									
25 items • Sorted by Title • Filtered by All ac ideas - Zone Name • Updated a few seconds ago Search this list...									
☐	Title ↑	Idea Status	Vote Score	Effort Value	Impact	Comm...	Jira Issue	Jira Status	
1	☐ AC test	Submitted	10			0			
2	☐ Bedside Shelf Flower Arrangement	Approved	30	3	7	4	AIU-105		
3	☐ Corporate Gift Baskets	Voting	10	3	5		TBD-54		
4	☐ Default status should be Submitted	Submitted	10			0	AEEME-1230		
5	☐ Del	Submitted	10			4	IDEAFLOW-10458		
6	☐ Design issue with mechanical rotor	Submitted	10			0			

Once the setup is finished, each idea with a related Jira ticket value will change its idea status (according to the mapping) once the ticket in Jira was updated.

For this feature, the scheduled job is launching each day at 6.00 AM GMT. So if the status in Jira was updated after this time, the status on the idea will be updated with the next job launching.

Also, the idea manager may click the “Synchronize Ideas with Jira Statuses now” button on the Ideas Settings page for manual launching of the synchronization job.

If the idea has changed the status (manually or with an auto-update rule) - the related Jira issue won't be updated.

NOTE If the idea status was changed manually (or auto-updated) - once the Jira issue status is changed, the idea status would be changed according to the mapping.

Moderation settings

Moderation Subtab shows the list of moderators and the list of forbidden words and expressions in Community Ideas. Enter the ban words separated by commas. Ban words apply also for a part of the longer word.

AC Ideas Ultimate

Ideas Settings

Ideas Zones

Ideas Moderators

Ideas Settings

General Settings

Zone Settings

Moderation Settings

LEX Ideas Settings

MODERATORS

Artur Zayets (artur.zayets@advancedcommunities.com): All

MODERATION RULES

Ban Words

bad, wrong

Save

Add the list of banned words and community members will be warned about using forbidden content when creating and commenting on the idea.

Post an Idea

General Information

Add Attachments

* Title

Bad Idea

You have forbidden words in the text: Bad

* Category

Education

* Description

Salesforce Sans12BBIU

bad idea

You have forbidden words in the text: bad

* - required fields

Cancel

Create Idea and Next

Set up Ideas Zones

Ideas Zones are used for separating different sets of Ideas. You only need to set up the Ideas Zones:

- If you are using Ideas on a community and internally (to collect Ideas from your employees, for example)
- If you have two or more communities with different sets of Ideas

To create Ideas Zone, go to:

- App Launcher - AC Ideas Ultimate - Ideas Zones - Click New.
- Fill in the Name. Choose the community in which this Zone will be shown.
- Enable the "Is Active" checkbox.
- Make this Zone visible for Guests by enabling the "Is visible for guests" checkbox. Click Save.

Create a Zone

*** Name**

Second Zone

*** Community Name**

Available

FirstCommunity
testcommunity

Selected

SecondCommunity

☒ **Is Active**

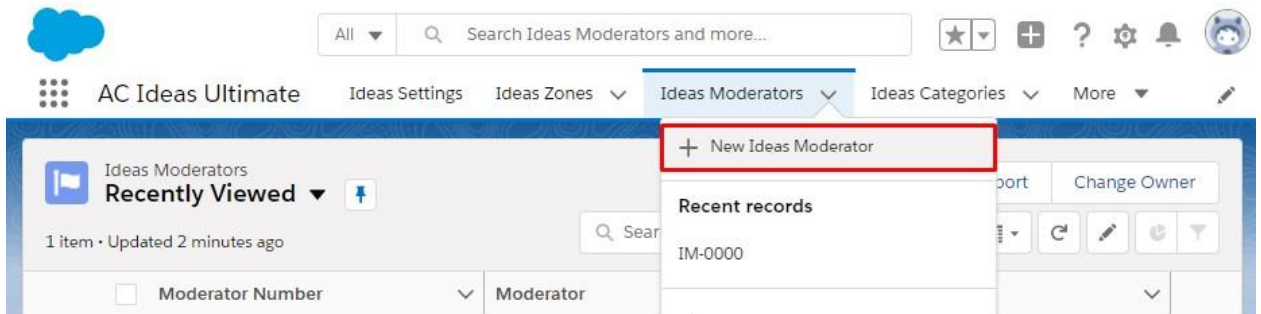
☒ **Is Visible For Guests**

Cancel Save

Set up Ideas Moderators

You can allocate Idea Moderators for any category(s). The idea moderators receive a notification for each new idea that is posted in that category.

To assign a user as a moderator, open the page by clicking on the “Ideas Moderators” tab, click on the “New” button or the “New Ideas Moderator”.



In the New Ideas Moderator window, click on the Moderator field and select a user to assign as a moderator,
In the Categories field, enter the Category names separated by a semicolon (;) and without spaces

For example, categories “Custom Ideas” and “Functional requests” should be entered as:

Custom Ideas;Functional requests

Or leave the value “All”, which is suggested by default. Click Save.

New Ideas Moderator

Information

Moderator Number

Owner
Artur Zayets

Moderator

Artur Zayets

Categories

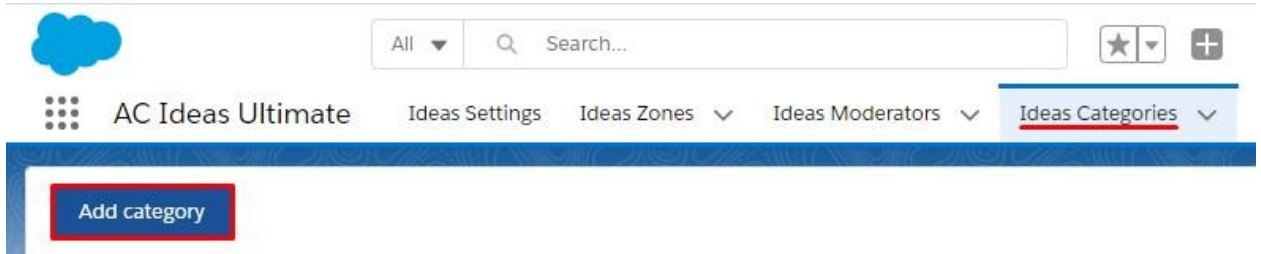
All

Cancel Save & New Save

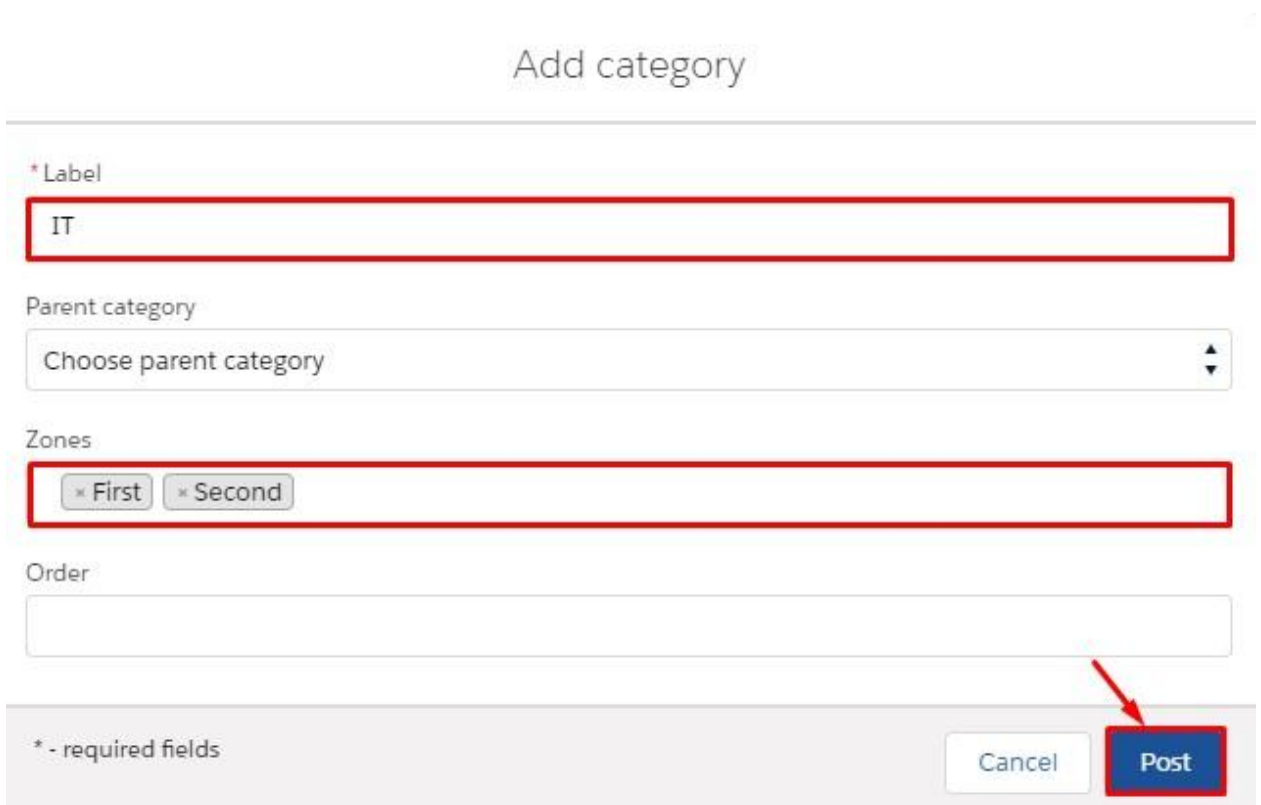
Set up Ideas Categories

You can assign one category to multiple communities. To do this, go to Ideas Settings and enable the “Categories multi-select enabled” checkbox.

- To add a new Category, go to:
 - Ideas Categories - choose “Add Category”



- In the “Add Category” window fill the next fields:
 - enter a Label of a custom category;
 - choose a Zones this category will be available for.
 - click Post.



Add category

* Label

IT

Parent category

Choose parent category

Zones

× First × Second

Order

* - required fields

Cancel Post

- It is possible to create a Categories Hierarchy. To do this, you add a sub-category by simply choosing a parent category for the category when creating it.

Add category

* Label

Subcategory

Parent category

IT

Zones

× First × Second

Order

* - required fields

Cancel Post

Please note that an idea can be assigned only to the last category in a chain. This means that if you have parent and child categories only the child can be assigned to Idea.

- Custom categories can be edited/deleted. Click on the category's name to make changes.

AC Ideas Ultimate Ideas Settings Ideas Zones Ideas Moderators Ideas Categories More

Custom category details

Label
IT

Zones
First;Second

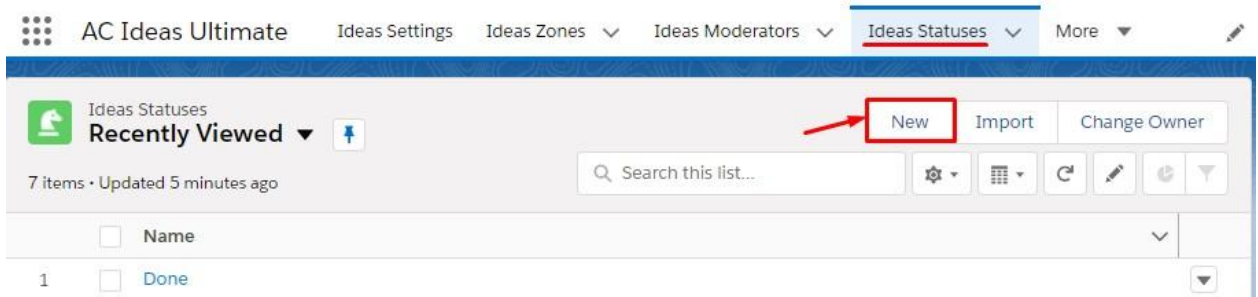
Order
Parent category

Delete Edit

Back to list

Set up Statuses

- To add a Status, go to:
 - Ideas Statuses tab - click New.



- In the “Create an Idea Status” window fill the next fields:
 - enter the Status name.
 - choose the status Color.
 - choose a Zone this Status will be available for.
 - make Status visible for guests by enabling “Is visible for guests” checkbox.
 - click Save.

Create an Idea Status

*** Name**

Under Consideration

*** Color**



*** Zones**

Available

Second

Selected

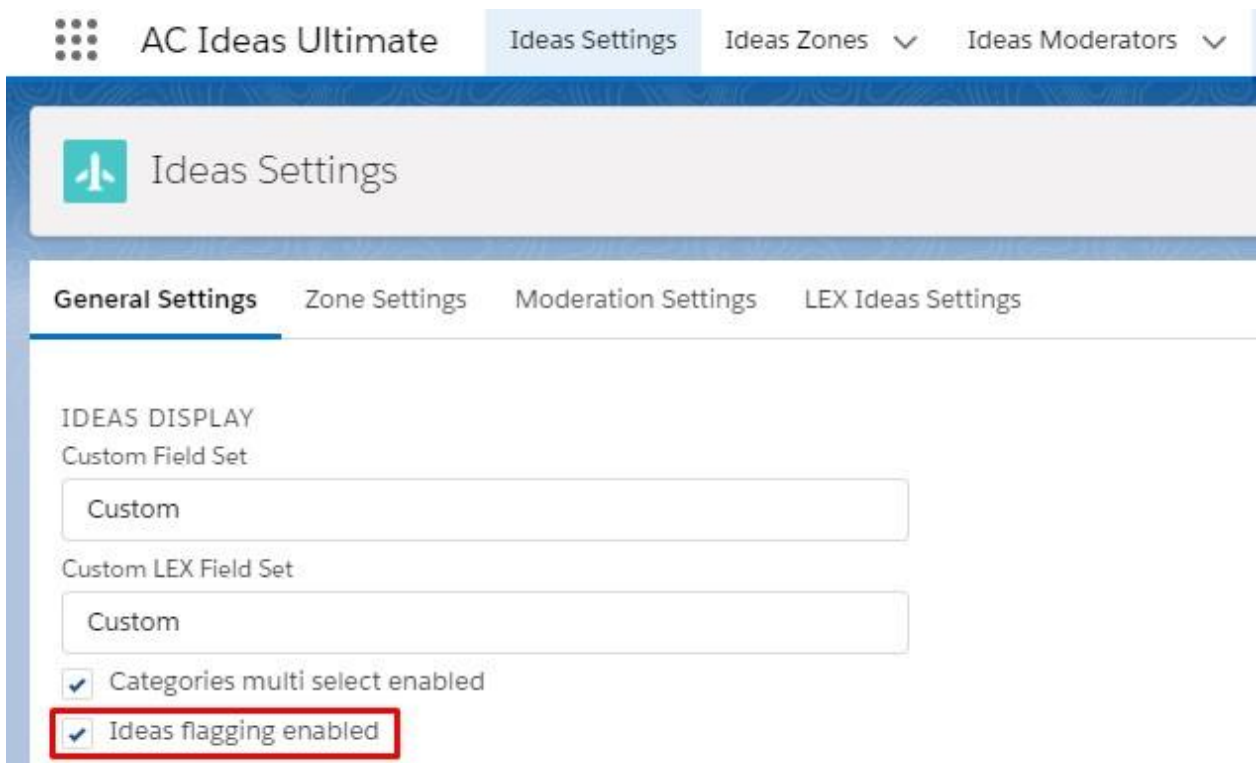
First

☒ **Is Visible For Guests**

Cancel Save

Set up Ideas Flags

You can enable the flagging feature for Ideas in Ideas Settings - General Settings.



AC Ideas Ultimate Ideas Settings Ideas Zones Ideas Moderators

Ideas Settings

General Settings Zone Settings Moderation Settings LEX Ideas Settings

IDEAS DISPLAY

Custom Field Set

Custom

Custom LEX Field Set

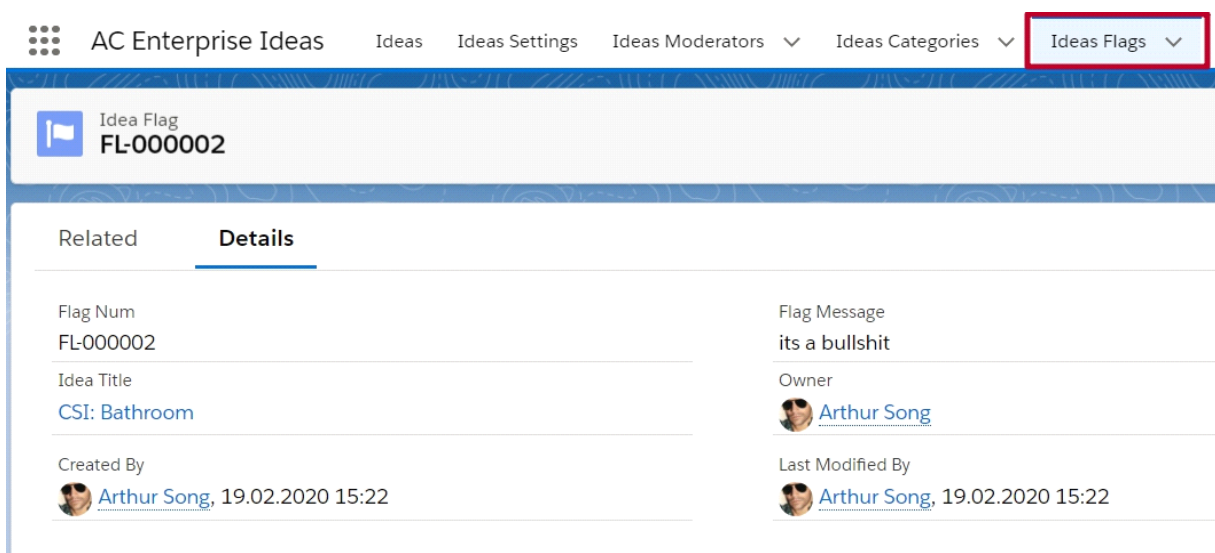
Custom

☒ Categories multi select enabled

☒ Ideas flagging enabled

When the flagging feature is enabled community members can flag the idea they like or don't like for some reason and explain their opinion with a flagging message.

Keep track of the flagged Ideas in the Ideas Flags tab.



AC Enterprise Ideas Ideas Ideas Settings Ideas Moderators Ideas Categories Ideas Flags

Idea Flag FL-000002

Related	Details
Flag Num FL-000002	Flag Message its a bullshit
Idea Title CSI: Bathroom	Owner  Arthur Song
Created By  Arthur Song , 19.02.2020 15:22	Last Modified By  Arthur Song , 19.02.2020 15:22

To start using this feature, check the Ideas Flags tab is the “Default On” for your community managers and if they have the appropriate object and field-level access.

Make sure the following fields are added to the Idea Flag object layout:

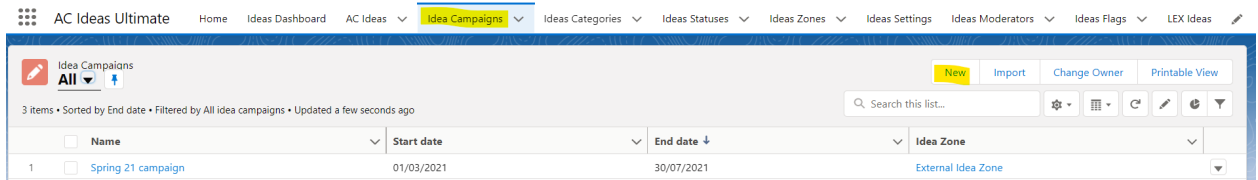
- Idea Title
- Flag Message

The screenshot shows the Salesforce 'Idea Flag' object layout configuration page. The left sidebar has 'Page Layouts' selected. The main area shows the 'Idea Flag' object layout with fields like 'Flag Message', 'Flag Num', 'Created By', and 'Currency'. Below the fields, there are 'Standard Buttons' (Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing) and 'Custom Buttons'. At the bottom, an 'Information' section shows the layout for a specific record with fields like 'Flag Num', 'Idea Title', 'Flag Message', and 'Owner'.

Set up Ideas Campaigns

To launch or schedule an Idea Campaign - go to the Idea Campaigns tab.

- Click the “New” button.

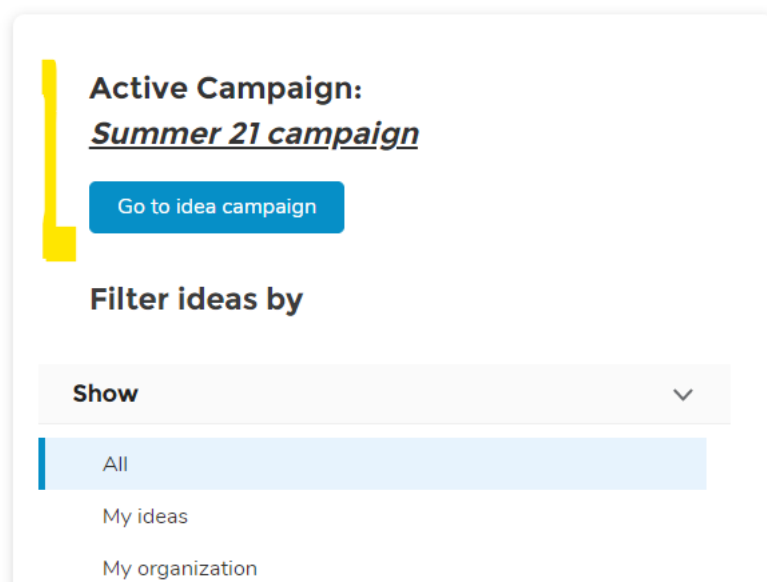


- Choose Zone for the campaign
- Fill in the Campaign Title name
- Provide a description of the campaign. The description supports rich text, including images. This description will be visible for site users on the campaign page. Describe why you are launching the campaign, what you propose to your users with this campaign, etc.
- Choose at least one category for this campaign. Please note, it is not possible to create a campaign without assigning categories.
- As a campaign is a time-limited activity, define when the campaign should Start and End. Please note, it is not allowed to run several campaigns within the same zone at the same time. So campaign dates should not be overlapped.
- Define the colour accent for ideas created within the campaign - in HEX code or colour picker.
- If you want to propose additional reputation point for site users who participate in the campaign - define it on the next three fields:
 - Increased reputation points for posting an idea to the campaign
 - Increased reputation points on voting for an idea in the campaign
 - Increased reputation points for commenting an idea to the campaign
- And define if this campaign is visible for guests (by default - visible)
- Click “Save”

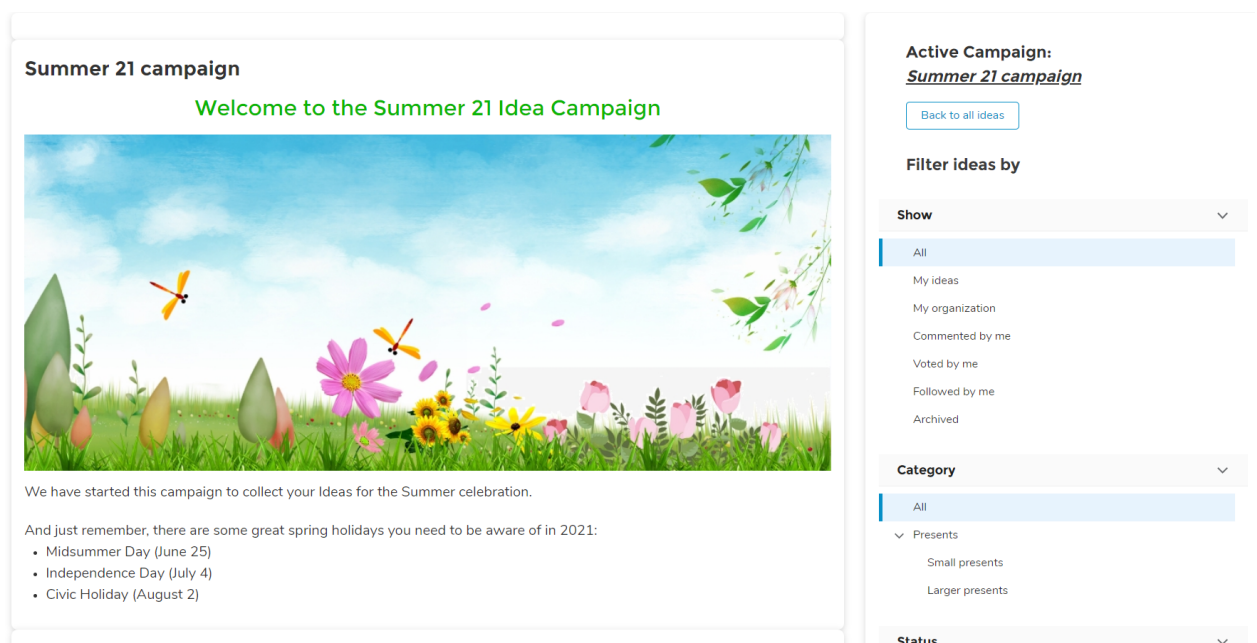
If you want to promote the campaign and the direct URL link needed - go to the campaign detail.

- Find the “Url Parameter” field
- Copy the value of this field and replace ‘example.com’ with the site domain name (before ‘/s/’)
- The newly created link could be used for forwarding users to the campaign page

If there is an active campaign on the site, idea list view will have the button for forwarding users to the campaign page:

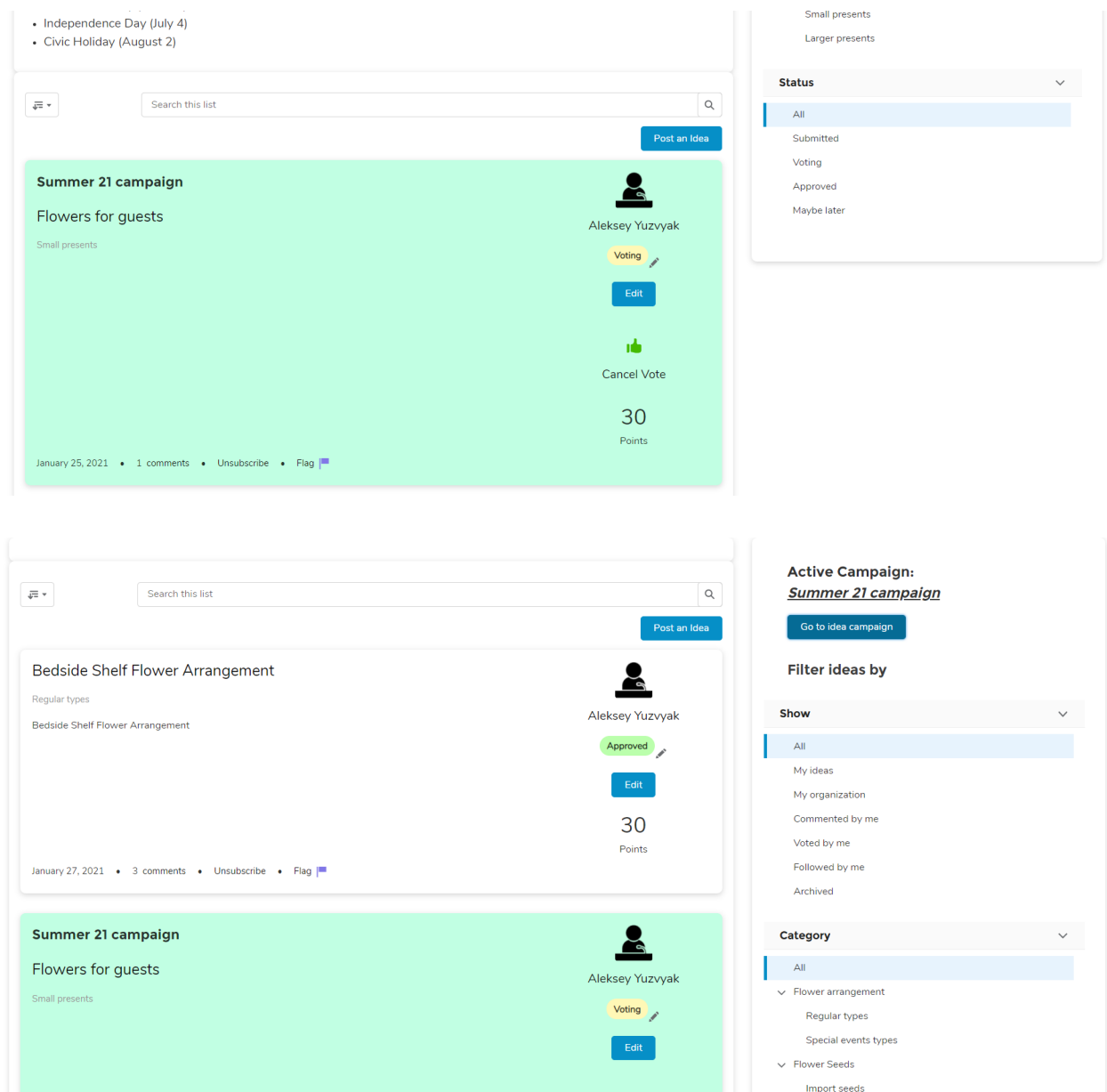


Idea campaign page consist of the same layout as regular idea page plus campaign description



Only categories selected for the campaign are available on the campaign page filter.

Ideas that are created for the campaign will be highlighted with the defined colour (both on the campaign list and regular list).



Once the campaign is finished - all ideas created for the campaign will remain in the regular list (but highlighting and campaign title will be removed). But the idea will keep campaign lookup value (could be found on the idea detail view in Salesforce).



AC Idea

Flowers for guests

Related

Details

Title

Flowers for guests

Description

Idea Status

[Voting](#)

Official Answer

Official Answer Date

Owner



[Aleksey Yuzvyak](#)

Archived



On Moderation



AC Zone

[External Idea Zone](#)

Idea Campaign

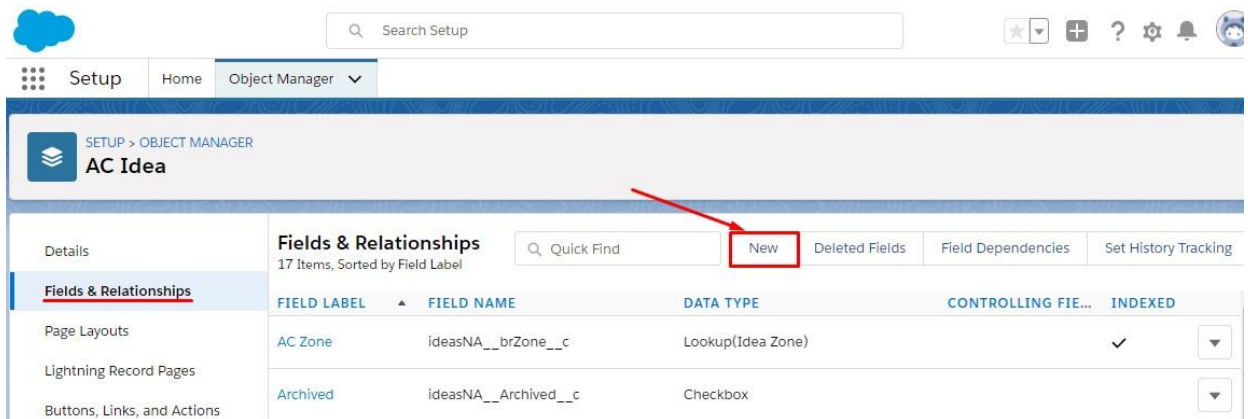
Summer 21 campaign

Custom Field Settings

Create Custom Fields and Field Sets to display unique information when creating ideas. You can create separate Field sets for Ideas creation in LEX and in the Community.

To create a custom field, do the following steps:

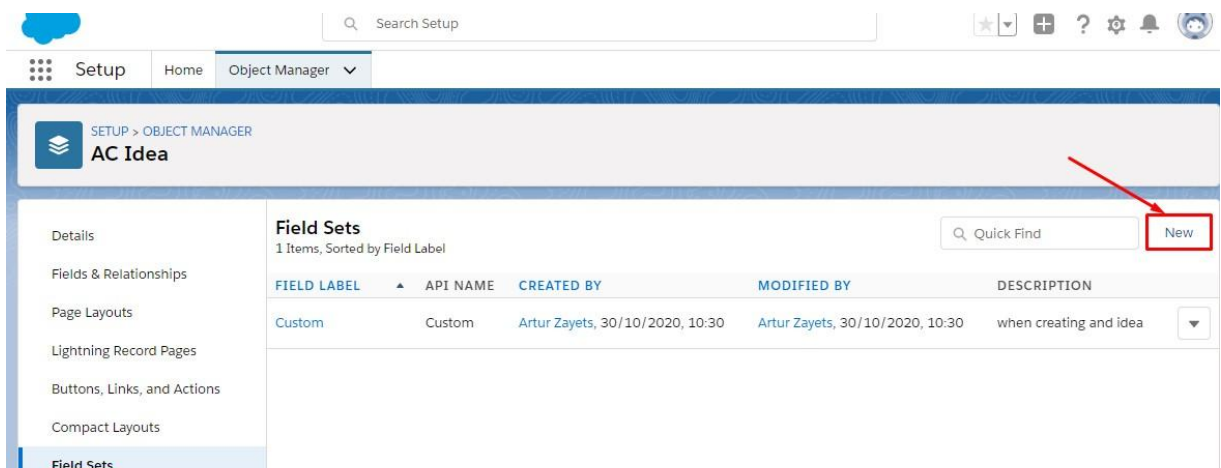
- Go to Setup – Object Manager – AC Idea
- Choose Fields & Relationships – click New.



- Choose the field type.
- Enter field Label.
- Establish field-level security.
- Add to the page layout – click Save.

To create a Field set, do the following steps:

- Go to Setup – Object Manager – AC Idea – Field Sets item – click New.



- Fill in all required fields and click Save.
- Find the created custom field and drag and drop it to the “In the Field Set” section. Click Save.

Custom

Save Cancel Undo Redo Field Set Properties

AC Idea

AC Zone
Created By ID
Last Modified By ID
Owner ID

Quick Find AC Idea Name

AC Zone	Categories	Is Visible For Gu...	Last Referenced Date	Official Answer Date	Status	VoteTotal
Archived	Created By	Last Activity Date	Last Viewed Date	On Moderation	System Modstamp	
Are you sure?	Created Date	Last Modified By	More Information	Owner	Title	
Body	Deleted	Last Modified Date	Official Answer	Record ID	Vote Score	

Drag any of the fields above into one of the lists below.

Available for the Field Set

Drag and drop the fields you want administrators to have available to add to the Field Set.

In the Field Set

Drag and drop the fields you want listed in the Field Set.

Are you sure?

- In order to display this field set when creating an idea, copy its API name.

SETUP > OBJECT MANAGER

AC Idea

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Field Sets

1 Items, Sorted by Field Label

FIELD LABEL	API NAME	CREATED BY	MODIFIED BY	DESCRIPTION
Custom	Custom	Artur Zayets, 30/10/2020, 10:30	Artur Zayets, 30/10/2020, 10:30	when creating and idea

- Insert the copied API field set's name to AC Ideas Ultimate – Ideas Settings tab – General Settings subtab – “Custom Field Set”/“Custom LEX Field Set” field.

 Ideas Settings

General Settings

Zone Settings

Moderation Settings

LEX Ideas Settings

IDEAS DISPLAY

Custom Field Set

Custom

Custom LEX Field Set

Custom LEX

☒ Categories multi select enabled

☒ Ideas flagging enabled

- See custom field added to “Post an Idea”.

Post an Idea

General Information

Add Attachments

* Title

* Category

* Description

Salesforce Sans

12

B

I

U

☐ Are you sure?

More Information

* - required fields

Cancel

Create Idea and Next

Community Setup

AC Ideas Ultimate package comes with the following lightning components:

- **AC Ideas Details Ultimate** - displays ideas details.
- **AC Idea Edit Ultimate** - displays the edit page of an idea.
- **AC Ideas Global Search Result Ultimate** - helps users search for Ideas across the community.
- **AC Ideas List Filters Ultimate**- serves to filter existing ideas by categories and statuses.
- **AC Ideas List Ultimate**- displays a list of published ideas.
- **AC Related Ideas Ultimate** - displays a list of related ideas.

Set up AC Ideas List Page

In the Community Builder, create a new Standard or Object page and add it to the navigation menu.

To create a Standard page, go to:

- Pages menu - New page - Standard page - enter the Name, URL and API name -
- Create. Publish your changes.

New Page

Give your page a name and a URL.

* Name
Ideas

* URL
/ idealist

API Name ⓘ
idealist

← Back Create

To create an Object page, go to:

- Pages menu – New page – Object page.
- Choose object AC Ideas – Create – Publish your changes.

New Object Pages

Select an object to create the detail, list, and related list pages associated with it.

Search All

AC Idea

Account

Account Brand

Account Clean Info

Asset

Asset Relationship

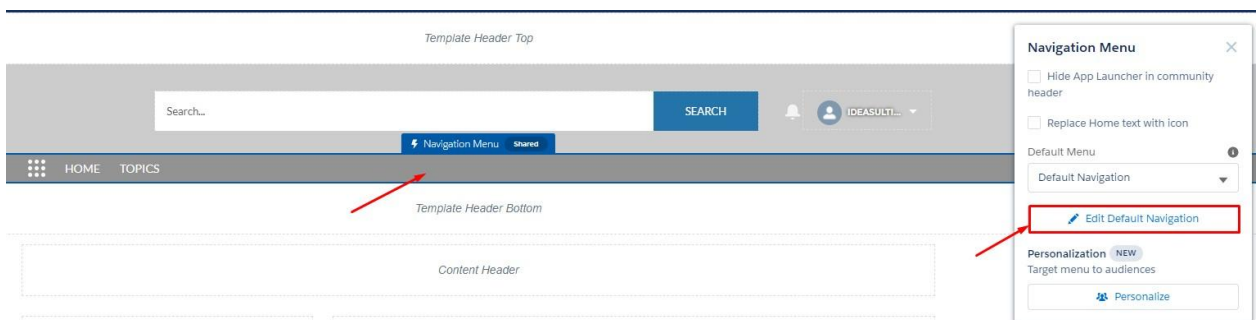
Assigned Resource

Associated Location

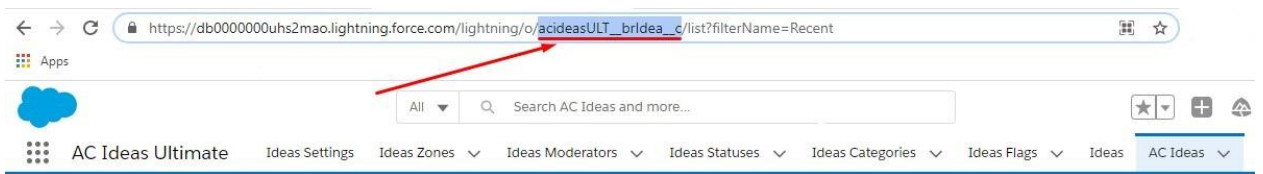
Back Create

To make the page available for community users, add it to the Navigation menu. Take the following steps to do this:

- Navigation Menu – Navigation Menu window.



- Click “+ Add Menu Item” – Enter the Name; Type: Site Page; Page: Idea List.
- Copy an appropriate list view ID on the AC Ideas tab address bar.



- Paste it into the Ideas Navigation page URL field using the following format:
/bridea/acideasULT_brIdea_c

Edit Default Navigation

* Menu Name

Default Navigation

Menu Structure

+ Add Menu Item

Home

≡ Ideas

Menu Item

* Name

Ideas

* Type

Site Page

* Page

AC Idea List

* URL

/bridea/acideasULT_brIdea_c/Rec

Please replace the parameters in the url of the page you selected. Parameters start with ":" and point to specific data, For example, :recordId.

☒ Publicly available

> Optional

Cancel Save Menu

- Publish your changes.

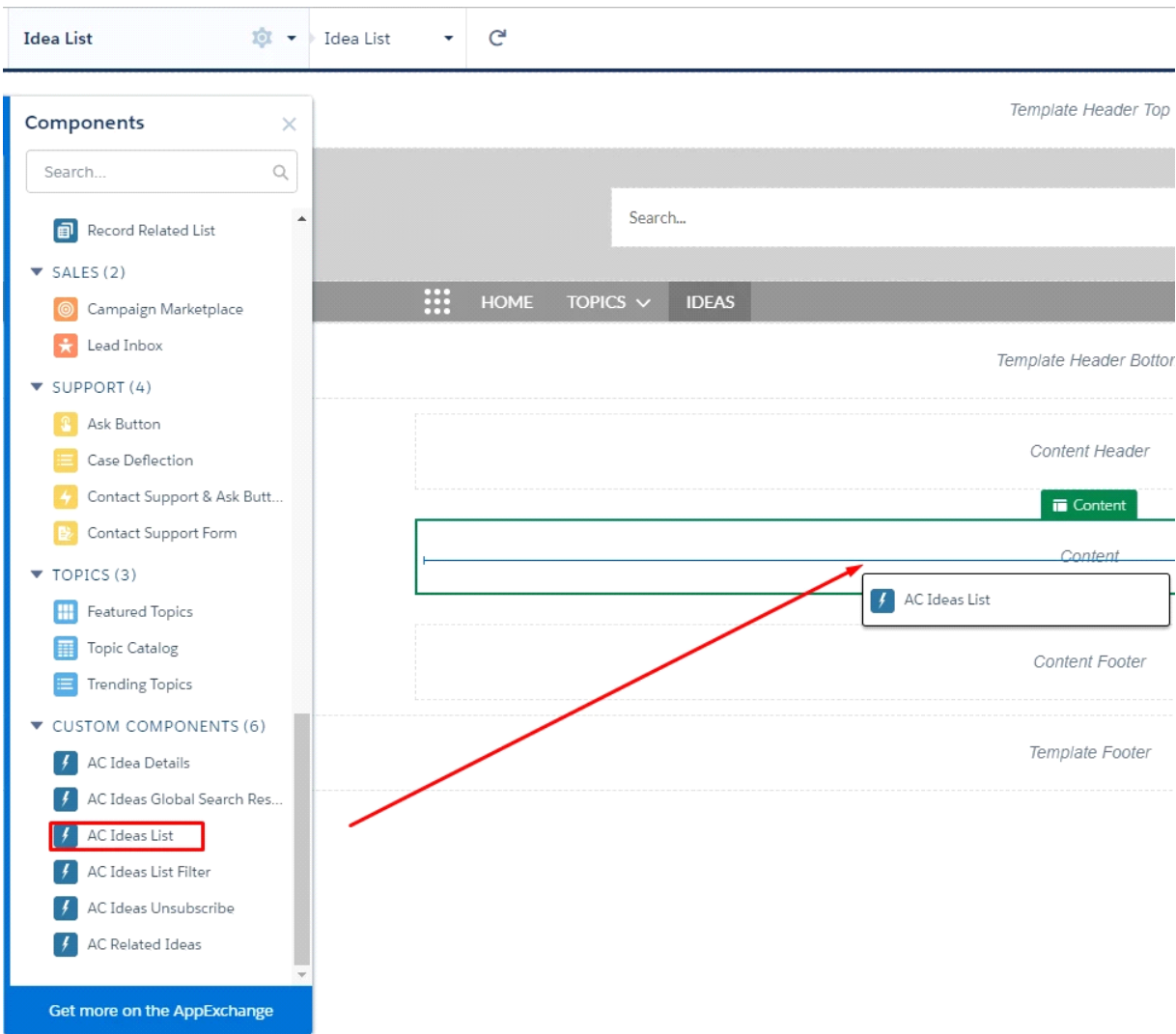
Add the following components to the page:

AC Ideas List Ultimate Component

The component is used on the Ideas List page and displays a list of published ideas.

Add a component to the page:

- On the “Idea List” page, click on the components tab to find the **AC Ideas List Ultimate** component in the drop-down list, and drag it to the page canvas.



- Open the Properties box by clicking on the component. Here you can manage Ideas Zone Name, the number of items per page and the default order of ideas. Choose a full or compact style of the Ideas list. You can also enable the Search field. Publish your changes.

AC Ideas List Ultimate ▼ ✕

Ideas Zone Name ⓘ

Internal

*** Items Per Page** ⓘ

5

Default order ⓘ

Configure:

- Ideas Zone Name.

47
igland and Wales (No. 6659236) VAT No. 115662818
ry Wharf, London E14 5RE United Kingdom
treet, San Francisco, CA 94105 USA
unities.com +44 20 3051 0075

! Make sure that you entered the correct Ideas Zone Name

- Items Per Page
- Default Order - set the default order of the Ideas list
- List Style - choose Full or Compact list style
- Enable/disable displaying the Search Bar.

AC Ideas List Filter Ultimate Component

This serves to filter existing ideas by categories and statuses. It can be added to the sidebar on the **Idea List** page.

Add a component to the page:

- On the “**Idea List**” page, click on the components tab to find the **AC Ideas List Filter Ultimate** component in the drop-down list, and drag it to the page canvas.
- Open the Properties box by clicking on the component. Here you can manage Ideas Zone Name and default filter groups order. You can also expand filter groups. Publish your changes.

AC Ideas List Filter Ultimate  

Ideas Zone Name 

Customer Zone

Filter groups order 

Display, Category, Status

☒ Filter groups expanded 

☐ Allow displaying previous campaigns 

☒ My ideas 

☒ My organization 

☒ Commented by me 

☒ Voted by me 

☒ Followed by me 

Configure:

- Ideas Zone Name - set zone name that Ideas are related to.

! Make sure that you entered the correct Ideas Zone Name

- Filter groups order - set the order of the filter groups.

- Filter groups expanded - enable/disable displaying filter groups expanded.

- Allow displaying previous campaigns - enable/disable displaying button for browsing previous idea campaign.

- My ideas - enable/disable the visibility of “My Ideas” filter. When filter applies the list display ideas were Idea Owner equals Current User.

- My organization - enable/disable the visibility of “My organization” filter. When filter applies the list display ideas were Idea Owner’s Company (on the relevant User record) equals Company of the Current

User.

- Commented by me - enable/disable the visibility of “Commented by me” filter. When filter applies the list display ideas which have comments from the Current User.
- Voted by me - enable/disable the visibility of “Voted by me” filter. When filter applies the list display ideas which have votes (up/down) from the Current User.
- Followed by me - enable/disable the visibility of “Followed by me” filter. When filter applies the list display ideas which have idea subscription recordsfor the Current User.

Set up AC Ideas Detail Page

If you use a Standard page for AC Ideas List create an Object page for AC Idea Detail.

If you already created an Object page for the AC Ideas List then add the following components to this page.

AC Idea Details Ultimate Component

Add a component to the page:

On the “**Idea Detail**” page, click on the components tab to find the **AC Idea Details Ultimate** component in the drop-down list, and drag it to the page canvas. Publish your changes.

Set up Idea Edit Page

Create a new Standard Page with the name **Idea Edit Page** (API name should become *Idea_Edit_Page__c* automatically) and add the following component:

AC Idea Edit Component

Set up the Search page

Add the following components to the standard Search page:

AC Ideas Global Search Result Ultimate Component

This helps users search for Ideas across the community. It has to be added to the standard Search page.

Add a component to the Search page:

- On the **Search** page, click on the components tab to find the **AC Ideas Global Search Result Ultimate** component in the drop-down list, and drag it to the page canvas.
- Open the Properties box by clicking on the component. Here you can manage the Ideas Zone Name, the default order of ideas, the number of items per page and the search string. Publish your changes.

AC Ideas Global Search  

Result Ultimate

Ideas Zone Name 

Items order 

Popular



Items Per Page 

Search String 

Configure:

- Ideas Zone Name - set the zone name that Ideas relates to.

! Make sure that you entered the correct Ideas Zone Name.

- Items order - set the order of items.

- Items per page - choose which items show first by default.

- Search String - system param.

Features Description

Create an Idea on the Community

To create Ideas just from the Community you have to log in as a user.

Create an Idea:

- Click the “Post an Idea” button on the Idea page.



- Fill the required fields in the pop-up window: Title, Category, and Description.
- Click “Create Idea and Next”.

Post an Idea

General Information

Add Attachments

* Title

Some Idea

* Category

x Business

* Description

Salesforce Sans ▼ 12 ▼ ■ ▼ B I U ↺
≡ ≡ ≡ ≡ ≡ ≡ ≡ ≡ ≡
Test Idea

More Information

☐ Are you sure?

Cancel

Create Idea and Next

* - required fields

Then you can add attachments to the idea within the “Upload Files” button. Click “Complete”.

Post an Idea

✓

Add Attachments

File uploader

Upload Files

Or drop files

Complete

Added files can be edited as Salesforce attachments.

The New Coffee

Food Technologies

Status

Under Consideration

20

Points

👍

Lisa Jones

March 18, 2019

Lisa Jones

Soon, coffee isn't going to taste like coffee — at least not the dark, ashy roasts we drink today. Big producers want a uniform taste, and a dark roast makes that easy: it evens out flavors and masks flaws. But now the best beans are increasingly being set aside and shipped in vacuum-sealed packs (instead of burlap bags). Improvements like these have allowed roasters to make coffee that tastes like Seville oranges or toasted almonds or berries, and that sense of experimentation is trickling down to the mass market; Starbucks, for instance, now has a Blonde Roast. As quality continues to improve, coffee will lighten, and dark roasts may just become a relic of the past.

Attachments:

Coffee 2.jpg

Coffee 1.jpg

coffee 2.jpg

coffee 1.jpg

Native List View of Ideas

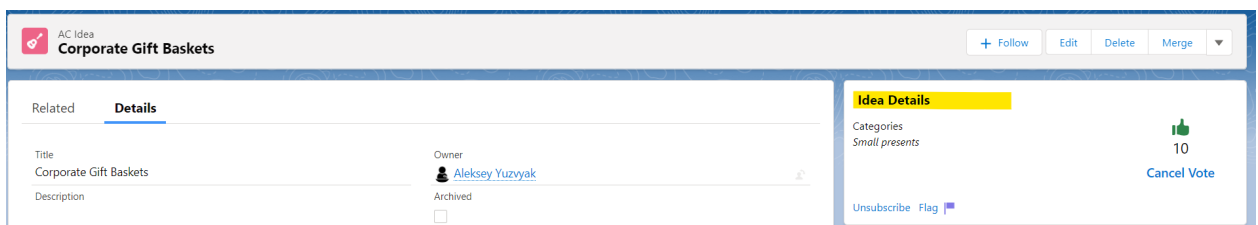
The AC Ideas Ultimate supports native list view of ideas in Salesforce.

The list of ideas can be found on the AC Ideas tab (add to the app if needed).

Due to several junction objects (are used for a better experience) - native editor and creation form is not supported. When you click the “New” or “Edit” buttons, a custom component is launched.

You can create several lists (for each Zone, for example), apply filters and use all native list Salesforce functionality.

To provide a better experience, the app uses the “AC Idea Details Lex Ultimate” component. Place it to any part of the idea detail page.



With this component, the internal Idea User can see the current state of the idea - assigned categories, vote, total score, (un)subscribe and/or flag the idea.

Kanban view support

Salesforce has a native Kanban view for records on any object. But this view works with picklist values from the object. Idea Status - is a lookup field on the idea records. So we added custom logic to synchronize picklist values with statuses on the idea.

With this functionality, Idea Manager can browse all ideas in a Kanban view. He can easily drag-n-drop ideas by statuses, use path features and many more with the native Kanban view.

Setup

- Create a custom picklist field on the Idea object with the Field Name: Kanban_Path_+Zone_Name (spaces “ ” in the Zone Name should be replaced with underscores “_” in the picklist name)
 - For example Zone Name = Test Zone, the field should be named Kanban_Path_Test_Zone
- Add to the picklist values as Status Names within the Zone

Note. Values order will influence the Kanban sequence, so define the ordering according to business logic.

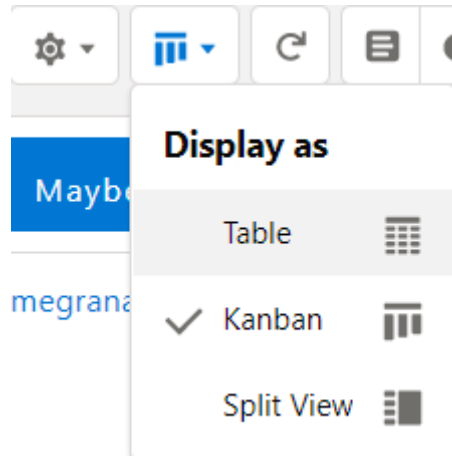
Best practice - Value names in the picklist should be the same as Idea Statuses which belong to the Idea Zone

Hint. If you define the first value as “default” - all newly created ideas in this zone will have this default Status (mark “Use first value as default value” checkbox)

The screenshot shows a configuration interface for a field. At the top, the 'Field Label' is 'Kanban_Path_External_Id' with an information icon. Below, the 'Values' section has two radio buttons: 'Use global picklist value set' (unselected) and 'Enter values, with each value separated by a new line' (selected). A text area below contains the values: Submitted, Voting, Approved, and Maybe later. To the right of the text area is a blue checkmark icon. Below the text area are three checkboxes: 'Display values alphabetically, not in the order entered' (unselected), 'Use first value as default value' (selected), and 'Restrict picklist to the values defined in the value set' (selected). At the bottom, the 'Field Name' is 'Kanban_Path_External_Id' with an information icon.

- Create the field
- Open the picklist field. For each value in the picklist, click edit and replace API Name of the value with Idea Status ID
- Repeat the steps above for each Idea Zone
- Add these picklist fields to the layout (for Idea Manager profile)
- Open Ideas standard list view
- Create a list for each Idea Zone (with filter enabled)
 - **Hint** - you can hide Archived ideas from the list for a better experience

- Switch list view to Kanban view



- Choose the related picklist field in “Group By” on the Kanban Settings.

Once the setup is finished it is recommended to launch Synchronization manually.

Go to Ideas Settings → General Settings → under “Kanban Path for Ideas” click the “Synchronization” button. The process will start, and once is done - the button becomes active.

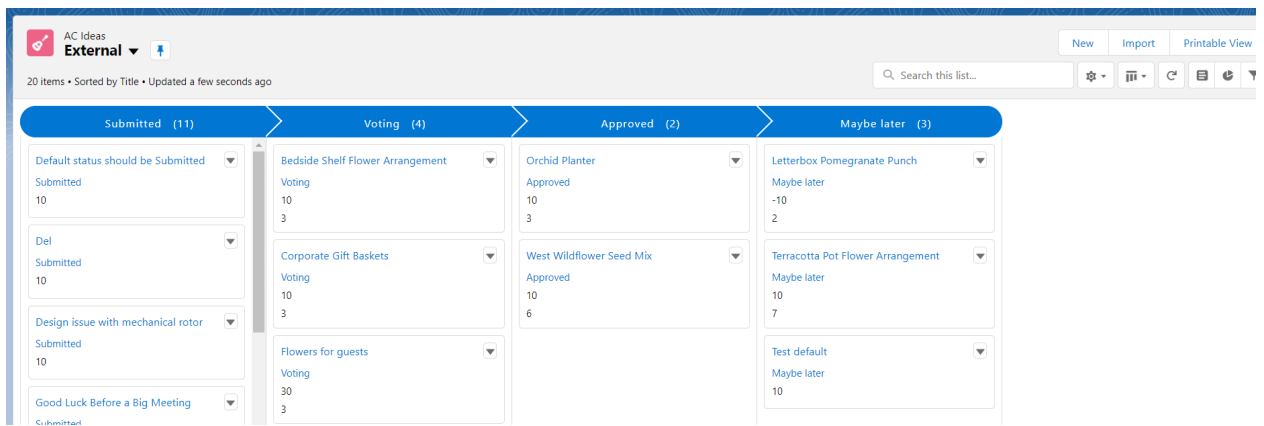
Manual synchronization could be used for any cases when automatic sync was not launched (new statuses were added and assigned to ideas before setting up the picklist, new business logic was implemented and statuses should be reassigned)

Note! The main source for the synchronization is Idea Status.

If the value from picklist was deleted - idea status won't change after manual sync.

If the idea status was deleted - picklist value becomes unchecked after manual sync.

Once the setup and sync are finished, the Kanban view for the Zone should display ideas according to their statuses.



Idea Manager may drag-and-drop ideas on the Kanban view, and Idea Statuses will change automatically.

And visa-versa, once the idea status is changed - the idea should move to another column on the Kanban view.

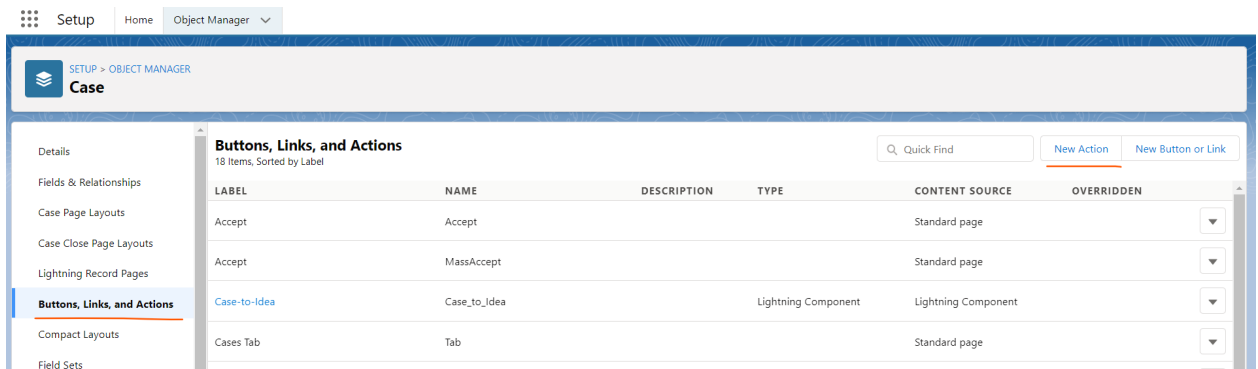
Don't forget - once the idea status is changed - subscribed user will receive a notification

Case to Idea feature

With this feature, the support team can easily create new ideas from cases. Creating ideas from cases is available for internal Salesforce users only.

To add the button to the case layout follow the steps:

- Go to Setup -> Object Manager -> Case
- Choose “Buttons, Links and Actions” -> click “New Action”



- Choose and click Save:
 - Action type - Lightning Component
 - Lightning Component - acideasULT:brIdeaCreateWindow
 - Height - adjust to 600px if needed
 - Label - name your button for a convenience

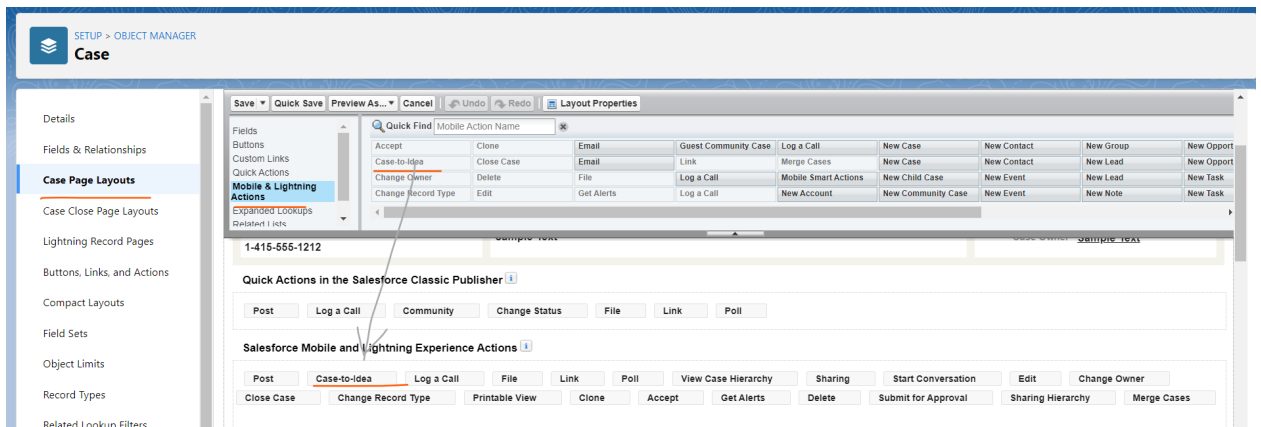
Case Actions New Action

The screenshot shows the 'Enter Action Information' dialog box. It contains the following fields and options:

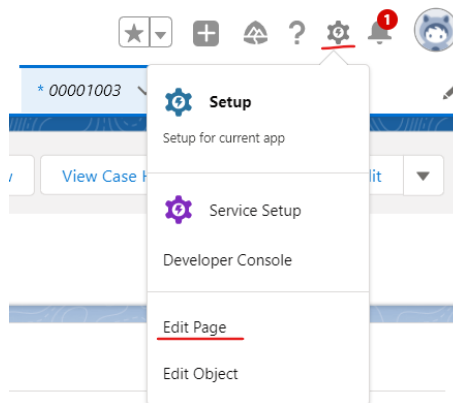
- Object Name: Case
- Action Type: Lightning Component
- Lightning Component: acideasULT:brIdeaCreateWindow
- Height: 600px
- Standard Label Type: --None--
- Label: Your Label
- Name: Your_Label
- Description: (empty)
- Icon: Change Icon

Buttons: Save, Cancel

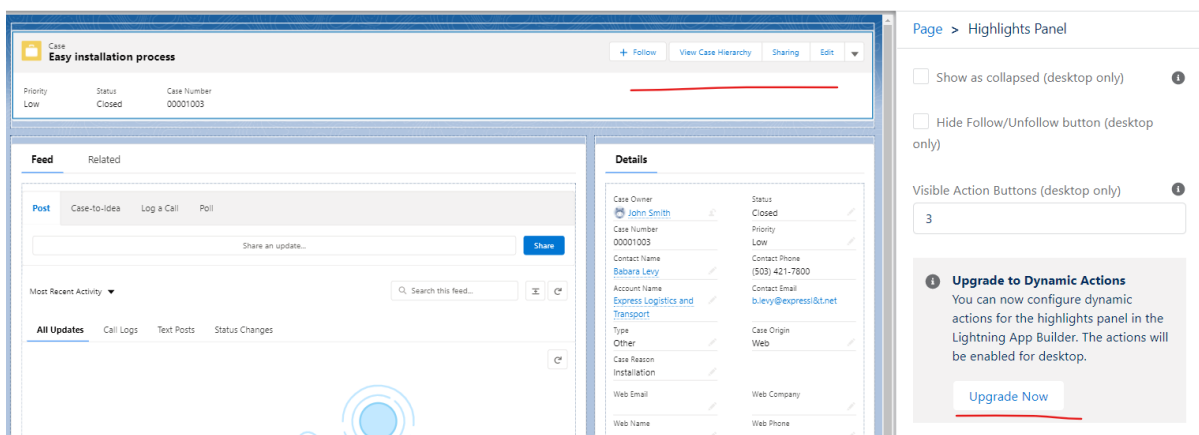
- Go to Case Page Layout -> Choose the layout -> Add the new button to the “Salesforce Mobile and Lightning Experience Actions” section -> Click Save



- If the button did not appear on the case -> Go to any case detail view -> click Gear button -> Edit Page



- Click the Highlights Panel -> find and click “Upgrade Now” on the “Upgrade to Dynamic Actions” section -> Choose Migrate -> Choose your page layout -> Save the Page



60

Once the setup is finished, support team members may click the new button on the case record. The new popup window appears. Once the Zone for the new idea is chosen the idea creation form is prefilled with case details.

Support team members should choose the appropriate category and post the idea.

The screenshot shows a 'Post an Idea' modal window. The 'General Information' tab is selected. The 'Zone' dropdown is set to 'Customer Zone'. The 'Title' field contains 'Easy installation process'. The 'Category' field is empty. The 'Description' field contains a rich text editor with the text: 'Once the setup is finished, support team members may click the new button on the case record. The new popup window appears. Once the Zone for the new idea is chosen the idea creation form is prefilled with case details.' The bottom of the modal shows a legend '* - required fields' and two buttons: 'Cancel' and 'Create Idea and Next'.

- Case Subject transfers -> to Idea Title
- Case Description -> Idea Description
- Case Owner -> Idea Owner

Comment on Idea

Idea's Discussion is also available on the Ideas Detail Page via Salesforce Chatter. Each user who has access to Chatter can comment on the Idea.

Some Idea

Business

Status 10 Points

Artur Zayets
November 11, 2020

Are you sure?
☐

Test Idea

Unsubscribe Flag

Back to list

Comments Voters

Post

Share an update... Share

Search this feed...

You can also disable the ability to comment on Ideas by clicking on the “Disable comments” checkbox in the Zone Settings (*Lightning Experience - AC Enterprise Ideas App - Ideas Settings tab - Zone Settings subtab*) and saving this change for a certain zone.

Change Idea's Status

When you change the status of the Idea, the moderators and subscribers will receive notification of this event.

You can change an Idea's Status using one of the following ways:

- Use the “Status Auto Update” function (*Lightning Experience – AC Enterprise Ideas App – Ideas Settings tab – Common Settings subtab*). Status Auto-Update is useful to define some vote threshold to change from “New” to “Under consideration” status to mark that a certain Idea reached the vote threshold and was automatically moved to “Under consideration” status. All other status changes should be done manually by the admin team.
- Change status manually in the Lightning Experience interface by editing the “Status” field next to Idea.
- On the Community, you can edit status both on the Idea List and on the Idea Detail page. Click on the “pencil” button, select a new status from the drop-down list, and Save. This feature is available for the System Administrator profile only.

List View

Idea

Category 1

Test Idea



yurij_egorov....



Detail view

Idea

Category 1



10
points



Test Idea

Merging Ideas

Ideation Managers may merge duplicate or similar ideas with idea merge functionality.

- Merge ideas button is available on Admin Interface only
- Choose the idea you want to merge (child idea)
- Click the “Merge” button inside Idea detail view AND “Merge” option in list view (both “compact” and “full”)

AC Ideas Ultimate

Home

Ideas Dashboard

AC Ideas

Idea Campaigns

Ideas Categories

Ideas Statuses

Ideas Zones

Ideas Settings

Ideas Moderators

Ideas Flags

LEX Ideas

AC Idea

Flowers for guests

+ Follow

Edit

Delete

Merge

Title	Category	Description	Status	Created On	Points
Bedside Shelf Flower Arrangement	Regular types;	Bedside Shelf Flower Arrangement	Approved	27 Jan 2021	20
Flowers for guests	Summer 21 campaign		Voting	25 Jan 2021	0

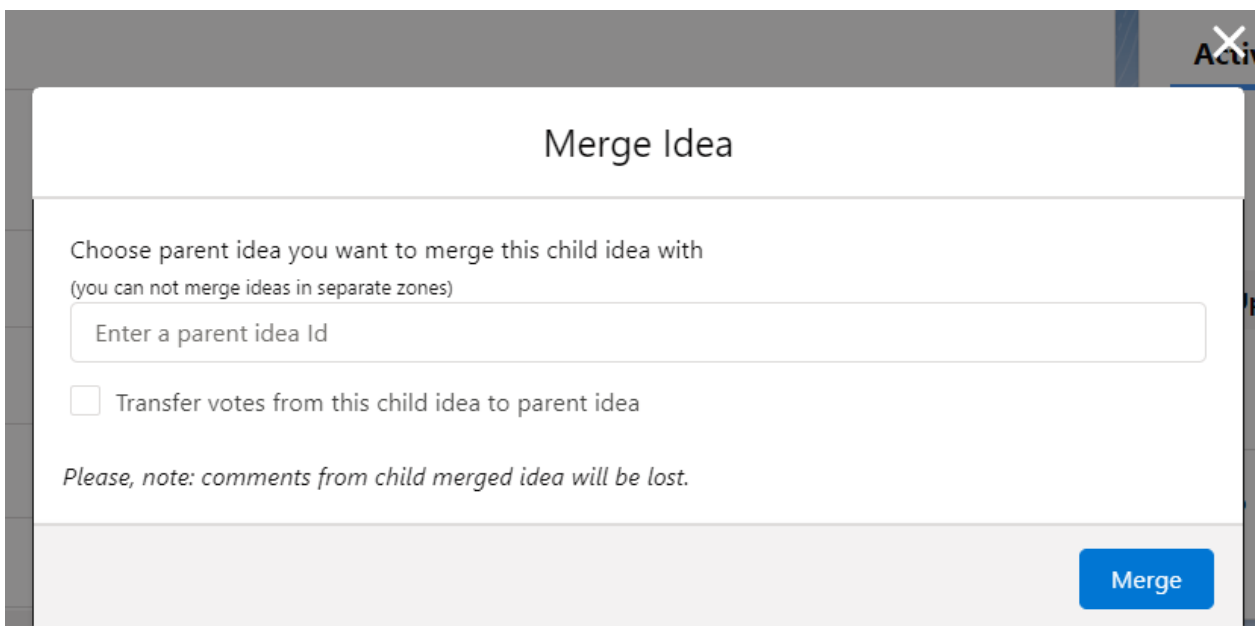
Merge

Edit

Delete

Unsubscribe

- On the form, enter Idea ID to the field for a parent Idea (from the browser URL)



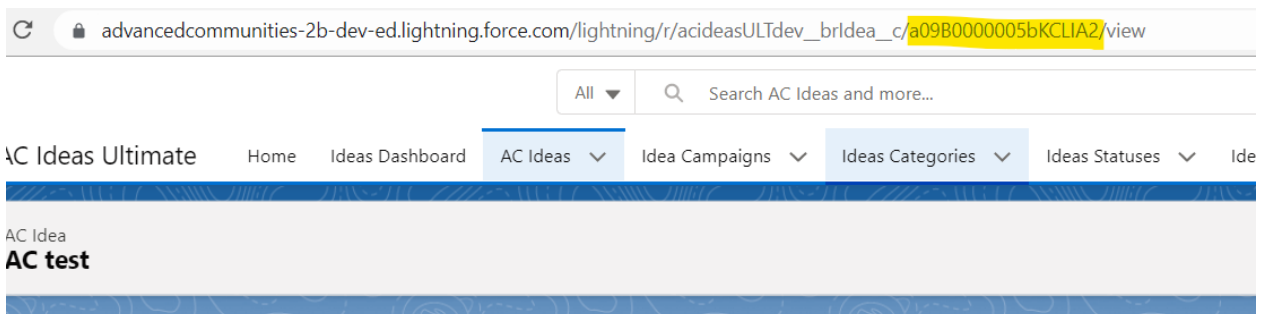
Merge Idea

Choose parent idea you want to merge this child idea with
(you can not merge ideas in separate zones)

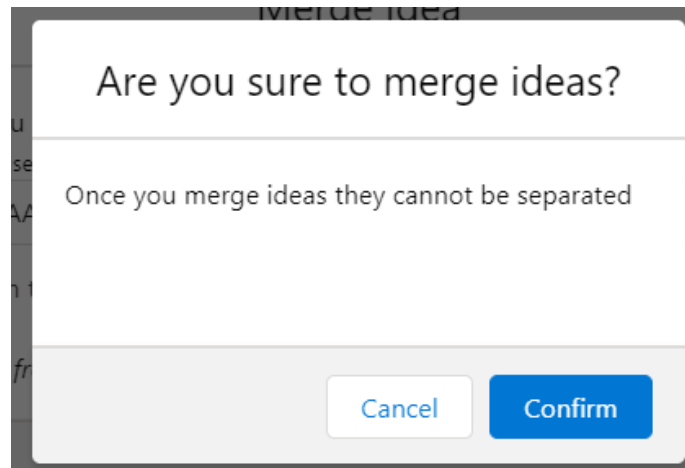
☐ Transfer votes from this child idea to parent idea

Please, note: comments from child merged idea will be lost.

Merge



- Choose the checkbox “Transfer votes from this child Idea to parent Idea” if you want to transfer votes from child to parent idea
 - If the checkbox has TRUE state, then votes and voters are adding to parent Idea (if the same user voted both for child and parent idea - only parent vote is saving)
 - If the checkbox has a FALSE state, then votes and voters are NOT adding to parent Idea
- Once clicked “Merge” - pop-up for confirmation is opened with a text
 - *Are you sure to merge ideas? Once you merge ideas they cannot be separated.*



- Once clicked “Confirm” in the pop-up - ideas are merged.
- Child Idea behaviour:
 - On the child idea editing, voting (and Cancel vote), commenting, subscribing, flagging and merging of the idea are disabling (toast message appears). The delete option remains available.

- On the detail view “The idea was merged with: {Parent idea name and link}” under the idea title is displayed.

AC Ideas Ultimate Home Ideas Dashboard AC Ideas Idea Campaigns Ideas Categories **AC test**

(This idea was merged with [Corporate Gift Baskets](#))

Regular types

Status **Submitted**

10 Points

[Cancel Vote](#)

- The merged child ideas could be accessible to the public if “Allow displaying archived ideas” on the Zone Setting has a TRUE state. The list of merged child ideas can be found in the “Archived” list.
 - If the archived setting has a FALSE state, the merged child idea remains accessible for the Owner, voters via the link in previous emails, and direct URL links.
- Subscribed users to the child Idea are receiving an email notification (template - IdeaMergeNotification)

Custom Email Template

IdeaMergeNotification

Preview your email template below.

Email Template Detail

[Edit Properties](#)

[Edit HTML Version](#)

Folder	AC Ideas Ultimate
Email Template Name	IdeaMergeNotification
Template Unique Name	IdeaMergeNotification
Namespace Prefix	acideasULTdev
Encoding	Unicode (UTF-8)
Author	Aleksey Yuzvyak [Change]
Description	Notification about idea merged to idea subscribers
Created By	Aleksey Yuzvyak , 19/01/2021, 16:05

[Edit Properties](#)

[Edit HTML Version](#)

Email Template

[Send Test and Verify Merge Fields](#)

Subject | {!ideaChildName} has merged

HTML Preview

[{!ideaChildName}](#), idea you follow was merged with idea [{!ideaParentName}](#).

- Parent idea behaviour:
 - Inherit votes from child idea (if checked)
 - Change status if votes transferred, Auto-update enabled, and the new amount is enough for auto-update status

- In Idea detail view for admin show field “Merged ideas” with {Child idea name and link}

Summer 21 campaign

Corporate Gift Baskets

Small presents

Status

Voting 

10

Points

Impact

5

Merged Ideas:

- [Idea 1](#)
- [AC test](#)

- Subscribed users to the child Idea are subscribed to the parent idea by default.

Archiving Ideas

Ideas that are old or declined can be archived. In order to move an idea to the archive, enable the correspondent checkbox on the AC Ideas edit view within the Lightning Experience. Those ideas will not be displayed in the community ideas list.

Note: if you don't see the 'Archived' checkbox on the Idea page, then you have to add this field to the AC Ideas page layout in Setup.

The screenshot shows the 'Edit Some Idea' form in Salesforce Lightning Experience. The form includes the following fields and components:

- Title:** A text input field containing 'Some Idea'.
- Owner:** A user icon and name, 'Artur Zayets'.
- Body:** A rich text editor containing '<p>Test Idea</p>'. The text is displayed in a code-like font.
- * Categories:** A text input field containing 'Business'.
- Idea Status:** A search bar with the text 'Search Ideas Statuses...'. Below it, a yellow highlight box contains the word 'Archived' and a checked checkbox.
- Official Answer:** A rich text editor with a toolbar showing 'Salesforce Sans' font and size '12'. The toolbar includes buttons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, and image. Below the toolbar is a large text area.
- Official Answer Date:** A date picker field.
- On Moderation:** A checkbox.
- Footer:** A bar containing the text 'Note total 2' and 'This field is calculated upon save'. Below this are three buttons: 'Cancel', 'Save & New', and 'Save'. A red arrow points to the 'Save' button.

Ideas Official Answer

Give official answers to posted ideas for community members so that they know they are heard.

Sleep Better

Medicine & Health

Status

40
Points

rose
February 26, 2019

Researchers at Merck have created a pill called suvorexant that essentially makes you a narcoleptic for a night. It turns out that might be the best cure for insomnia. Unlike existing sleep aids, the drug (which will likely be reviewed by the F.D.A. later this year) works by turning off wakefulness rather than by inducing sleep. "There's good reason to believe this pill brings on more R.E.M. sleep and better rest," says Dr. Emmanuel Mignot of Stanford University. "It'll be less of a hammer on the brain."

Status Update

Updated On 2019-11-21

Dear Rose,

We consider your Idea very interesting and helpful!

[Subscribe](#) [Flag](#)

[Back to list](#)

To add an official answer, edit the idea, add your answer to the Official Answer field and set up the date the answer is added.

Limit vote per Idea

This feature helps to make different organizations more equal regardless of the number of community members that they have. There could be a situation where organizations with a large number of users could vote for the same idea and make the idea scoring distorted so restricting the number of votes per organization would make each client equal in terms of the voting power.

If you want to limit votes per an idea from one account, go to Event Settings -> Zone Settings

- Find the “Limit voting for Users from the same Account per one Idea” checkbox
 - If the checkbox is UNCHECKED - the next field is disabled
 - If the checkbox is CHECKED - the next field is enabled
- Define the number of available votes for Users from the same Account (number field). Available values - from 1 to 999 (blank AND 0 values - are prohibited). Use the “How many users from the same account may vote for one Idea” field

☒ Limit voting for Users from the same Account per one idea

* How many users from the same account may vote for one idea

6

Note. We try to avoid any errors for existing App Users. After enabling this feature we handle ideas with votes exceeding the limit.

For example, if the idea has 5 votes from users in the same account, we enable this checkbox and limit it to 1 vote from the account, so no votes will be removed from the idea, but further voting for this idea will be disabled for users from this account.

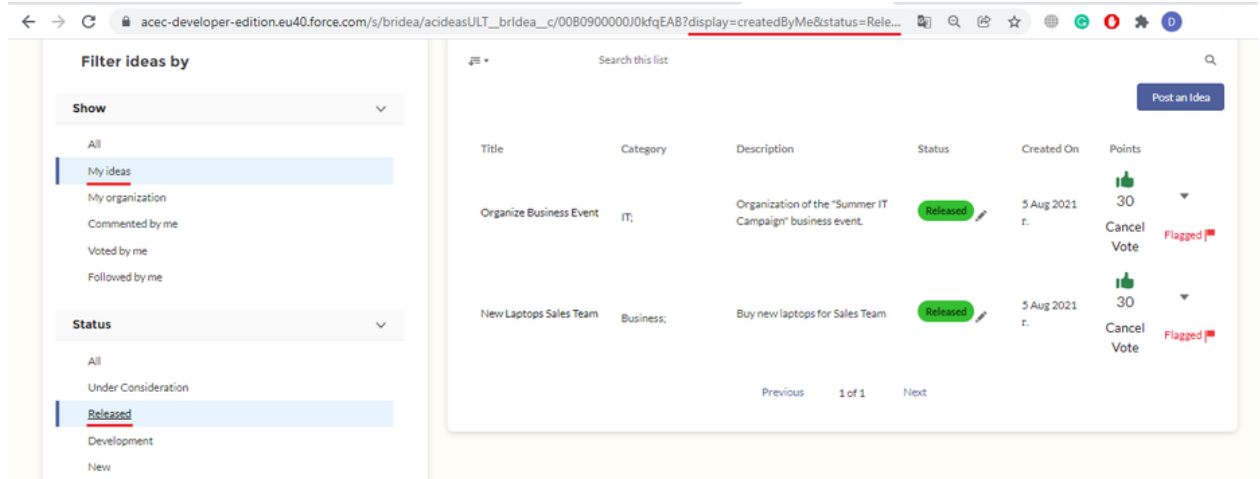
For Site users voting buttons are invisible if a limit per idea is reached. The message is displayed on the full list view and on the detail page: “Your colleagues already voted”

On the compact list layouts, only Vote Score is displaying (without upvote/downvote buttons)

Prefiltered URLs

Get direct links to applied filters on the list of ideas.

When filtering the ideas, the filter parameters are passed to the URL.



The "Back to list" button saves applied filters and pagination when going back from the AC Idea Detail to the AC Ideas List.

Page Variations usage to setup multiple Ideas Zones

This feature allows creating different versions of the page and making these options available to specific audiences and groups. You can use Page Variations to try out different page layouts and styles or create variations that are aimed at a different audience. Each page on the community, including custom pages, should have one default page variation. You can add as many extra variations as you need on the page's Page Variations tab.

In order to customize page variations for audiences, you need to create two audiences and two page-variations for the "Idea List" page:

- Community Builder – menu pages – choose Idea List – click Page Properties – choose Page variation – click Manage Audiences – New Audience.
- Create two Audiences called "Community Users" and "Internal Users":
 - For the "Community Users" audience, select the appropriate profile for external users.
 - For the "Internal Users" audience, select the appropriate profile for internal users.
- You are able to create two page-variations when at least two Audiences have been created.
- Create two page-variations called "Idea Community Users" and "Idea Internal Users":
 - For the "Idea Community Users" page variation, assign an audience called "Community Users".
 - For the "Idea Internal Users" page variation, assign an audience called "Internal Users".

Admin Dashboard

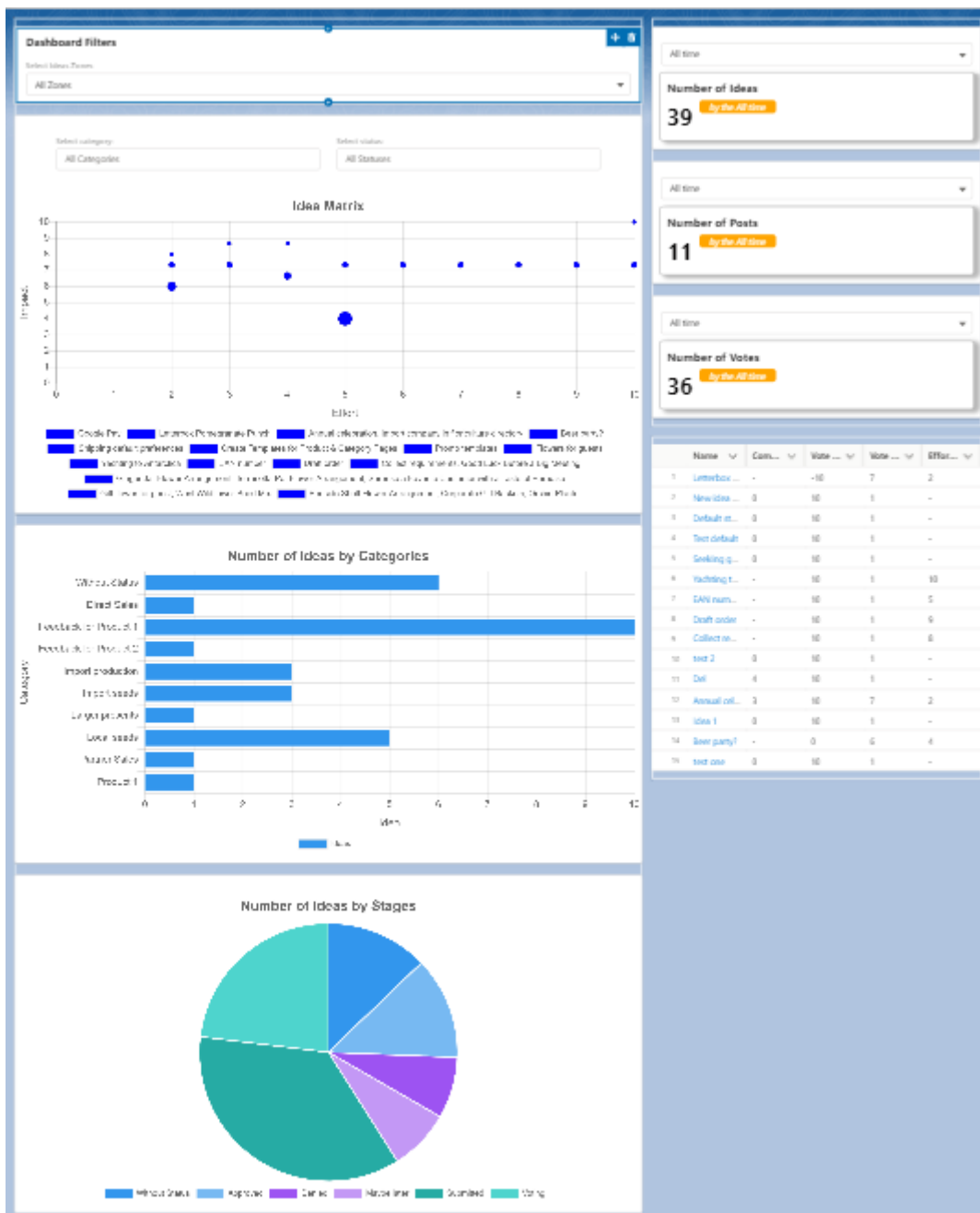
With this feature, innovation managers can track the ideation performance, analyze the number of votes, posts, new ideas, idea categories, and statuses.

The dashboard works with reports included in the package.

The dashboard is working inside Salesforce only, it is not available to use the dashboard's components on the site. Place the components on the Ideas Dashboard tab page.

Dashboard's Components:

- AC Ideas Dashboard Filters Ultimate
- AC Ideas Report Table Ultimate
- AC Ideas Report Summary Ultimate
- AC Ideas Report Matrix Ultimate
- AC Ideas Report Chart Ultimate



AC Ideas Dashboard Filters Ultimate

This component is used for filtering all other components' data by Idea Zone.

The component has no properties. By default - All Zones are chosen, with this value - all data is displaying from all existing zones in the Ideas Ultimate app.

AC Ideas Report Table Ultimate

This component is used for displaying reports in table format.

The component has the following properties:

- Report API Name - text field. This property gets the API name of the report and defines which report should be used to display. By default, the component works with the “Idea_Main” report.
- Max Row Number - number property. The default value = 15. This property defines the maximum number of rows in the table. If the report has fewer rows than the property value - only existing rows will be displayed.

	Name ▾	Com... ▾	Vote ... ▾	Vote ... ▾	Effor... ▾
1	Bedside S...	4	10	1	3
2	West Wild...	-	10	1	6
3	Terracotta ...	-	10	1	7
4	Seeking g...	0	10	1	-
5	My test co...	0	20	2	-
6	AC test	0	10	1	-
7	test	0	-10	1	-
8	Flowers fo...	-	30	3	3
9	Maintenan...	0	10	1	-
10	Orchid Pla...	-	10	1	3
11	Ginger Jar ...	-	10	1	7
12	Design iss...	0	10	1	-
13	Corporate ...	-	10	1	3
14	Annual cel...	3	10	7	2
15	Surprise a ...	-	10	1	7

The component displays by default from the “Idea Main” report (by columns):

- Idea Title - clickable link → forwarding to the idea detail page
- Comment Count - the number of all comments about the idea in the chatter (posts + replies)
- Vote Score - the total score of the idea
- Vote Total - the total number of all votes for the idea (upvotes + downvotes)
- Effort Value - the idea’s effort value

The ideation manager may sort the table by any column, except the Title (by clicking on the column header). By default, the table is unsorted.

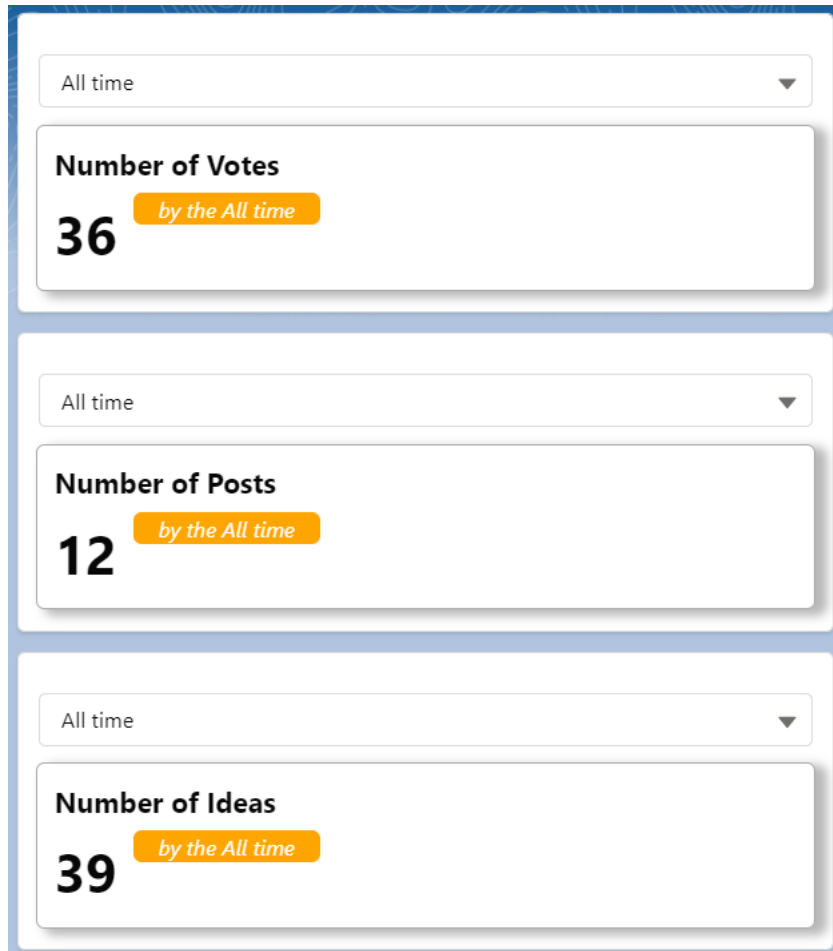
Also, the ideation manager may wrap/clip the text or change the width of the columns (native SF functionality).

AC Ideas Report Summary Ultimate

This component is used for displaying one figure from the report - the total number of ideas/posts/votes.

The component has the following properties:

- Report API Name - text field. This property gets the API name of the report and defines which report should be used to display. By default, the component works with the following reports:
 - Idea_Votes - shows the total number of votes
 - Idea_Posts - shows the total number of posts in chatter (without replies)
 - Idea_Main - shows the total number of ideas
- Title - text field. This property defines the displaying title of the data.



The component is displaying the total number of the data for “All time” by default. The ideation manager may choose on the component the time:

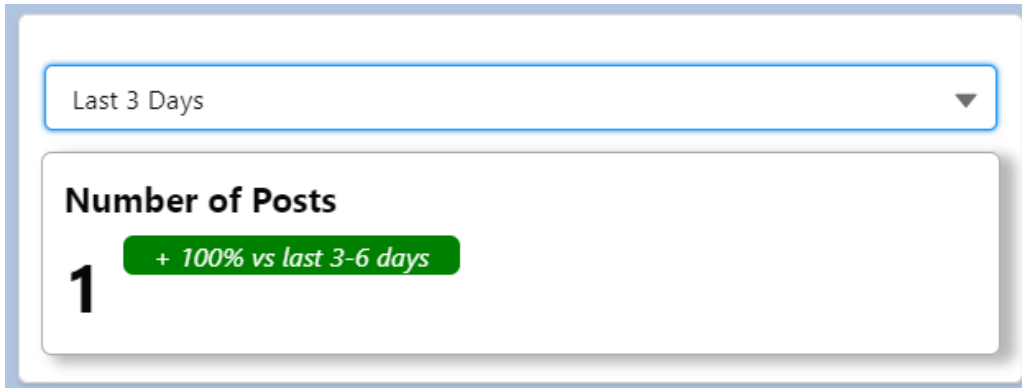
- All time (default)
- Last 3 days
- Last 7 days
- Last 30 days

Once the other than “All time” is chosen - the component displays the number of the data for the appropriate period, Also the component displays the dynamics of the data

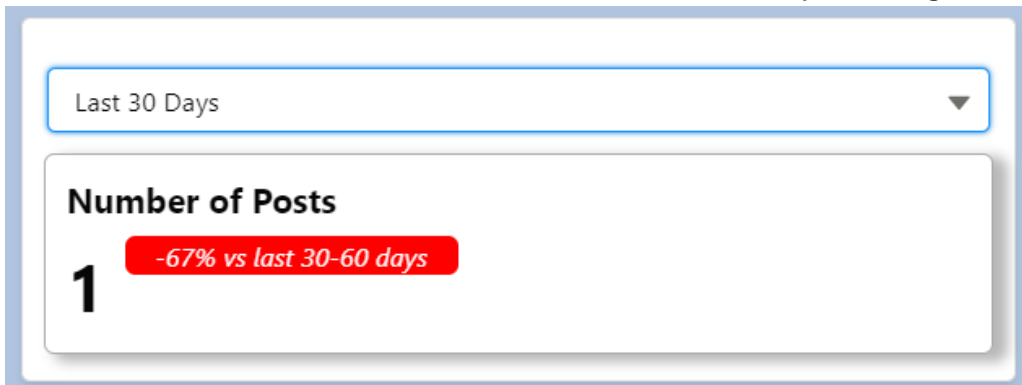
- Last 3 days - compares with previous 3 days
- Last 7 days - compares with previous 7 days

- Last 30 days - compares with previous 30 days

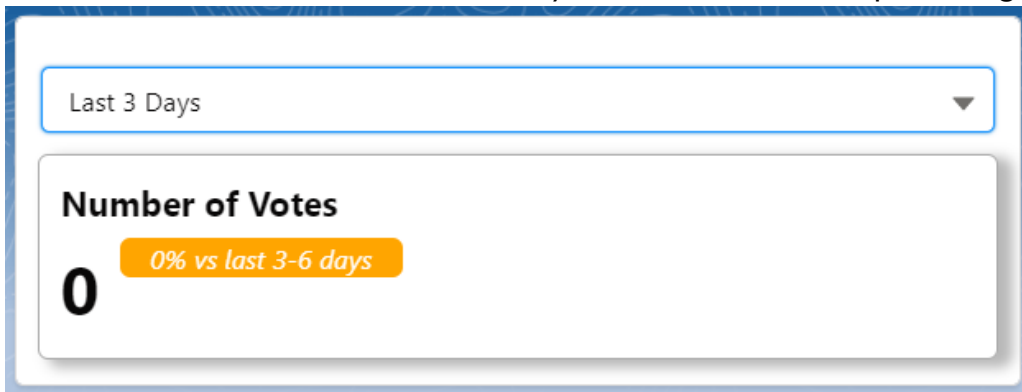
If the number grew - green label with the percentage of the change



If the number fell - red label with the percentage of the change



If the number remained the same - yellow label with the percentage of the change



AC Ideas Report Matrix Ultimate

This component is used for displaying the Effort/Impact matrix.

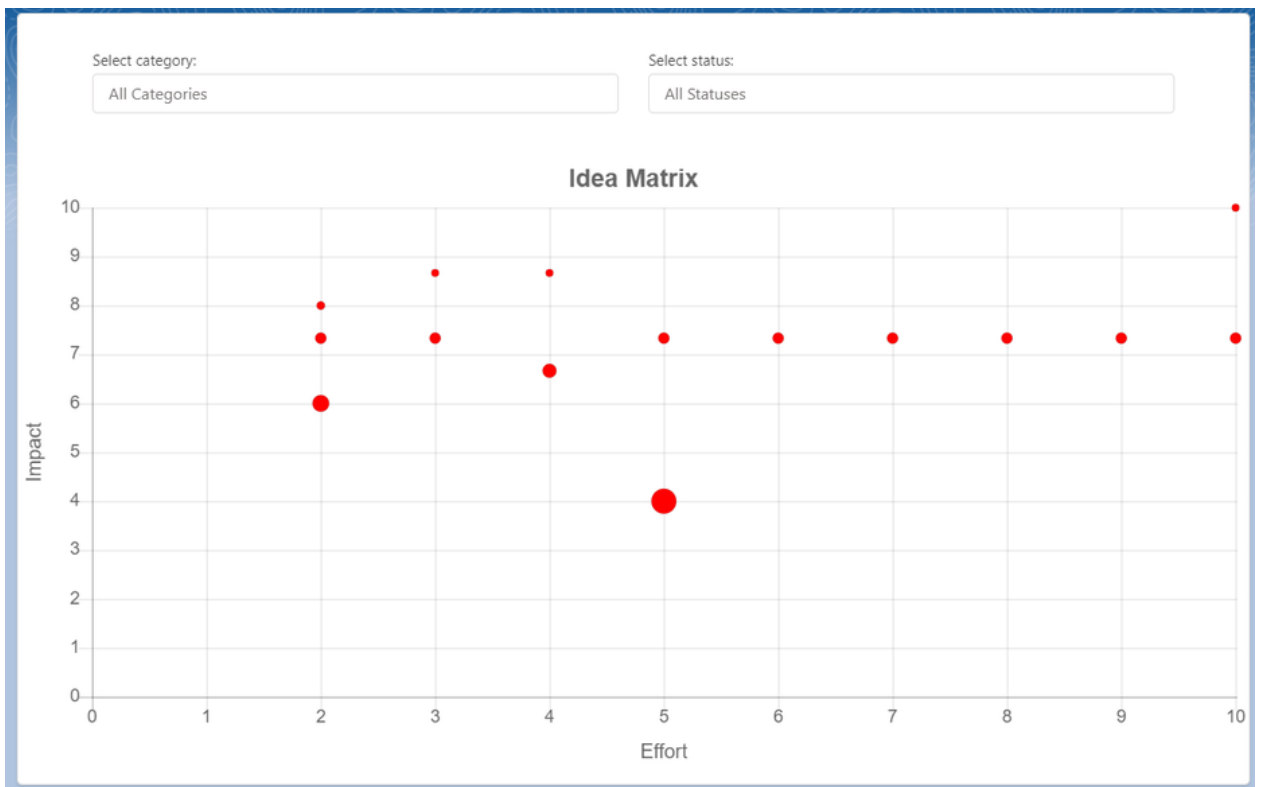
The idea has two values:

- Effort
 - picklist field from 1 to 10 - this field is used to define the complexity of the idea implementation. The ideation manager defines the value manually

- Impact
 - by default: it is the formula value (from 1 to 10) that consists of the weighted parameters
 - Total score for the idea (weight 2/3)
 - Total number of comments to the idea (weight 1/3)
- The ideation manager may choose another field (including custom) as an Impact parameter.

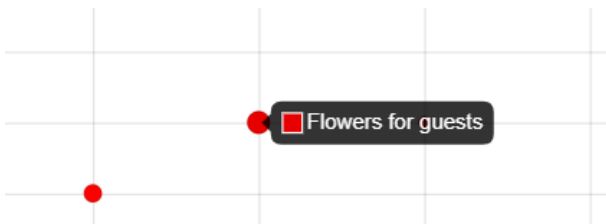
The component has the following properties:

- Report API Name - text field. This property gets the API name of the report and defines which report should be used to display. By default, the component works with the "Idea_Main" report.
- Override Impact formula by field - picklist property, default value --Default--. This picklist displays fields on the AC Idea object. By choosing the field - idea manager may change the Impact displaying for the ideas (with the values from the field)
 - **NOTE** The Impact axis must be in Number format
 - **NOTE** The maximum value of the Impact axis - must be less than 1000
 - **SO THAT** If you use Currency or Percent fields and/or the maximum value is over 1000 - use an additional formula field to convert to the number type and adjust the value to Ks ('000), Ms ('000,000), Bs ('000,000,000)...
- Title - text field. This property defines the displaying title of the graph.
- Name for X-axis - text field, defines the title of the horizontal axis.
- Name for Y-axis - text field, defines the title of the vertical axis.
- Max Points Number - number field, defines the maximum number of points on the matrix graph.
- Points Color - text field, defines the colour of the points on the matrix graph. The values could be in text or HEX format
- Display Matrix Legend - checkbox field, default - FALSE, defines if the legend of the graph should be displayed or not.



The component displays the matrix of ideas with the Effort / Impact layout.

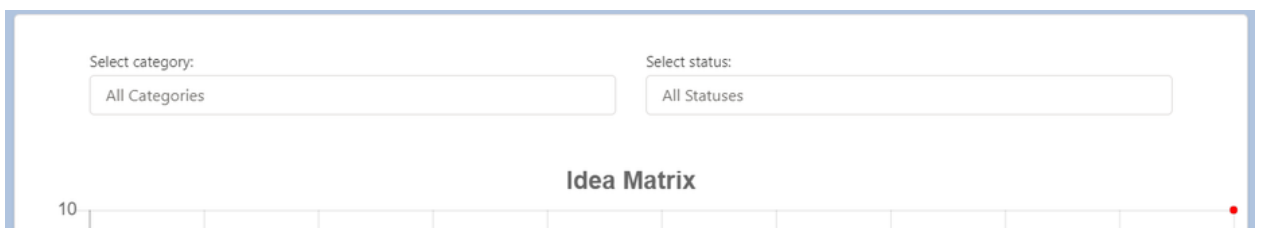
The point on the graph - the idea. Hovering the point - displays the idea title.



If several ideas have the same impact/effort value - only one point is displaying, hovering on the point displays ideas titles separated with a comma.



By default, ideas from all categories and all statuses are displayed.



The ideation manager may choose ideas categories and/or statuses and see the graph for the chosen parameters. These parameters are multi-select available, so several categories and/or statuses could be chosen.

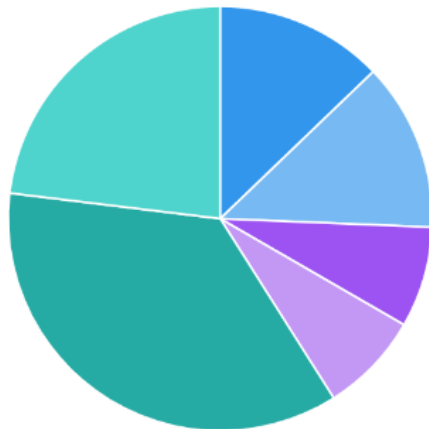
NOTE! Select category & Select status parameters should work with the Zone filter - categories and status that are available for choosing are assigned to the chosen Zone.

AC Ideas Report Chart Ultimate

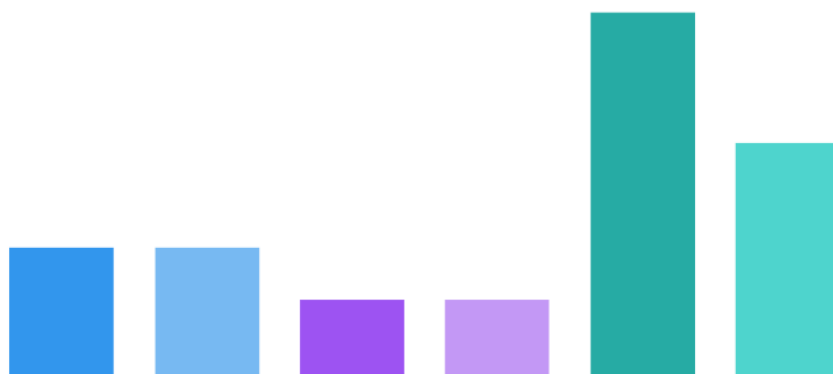
This component is used for displaying graphs about the ideation process.

The component has the following properties:

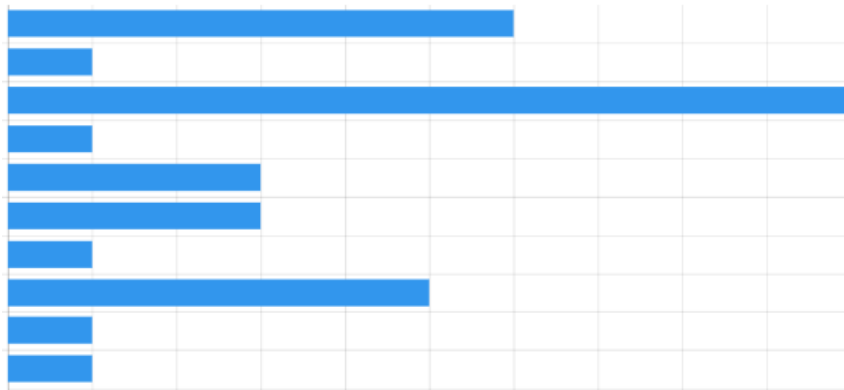
- Report API Name - text field. This property gets the API name of the report and defines which report should be used to display. Out of the box, the component works with the “Idea_Categories” and “Idea_Statues” reports.
- Type - required picklist property, defines the type of the chart:
 - Pie



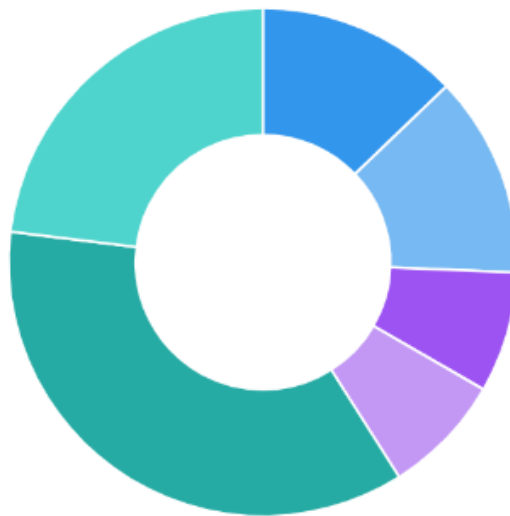
- Bar



- horizontal Bar



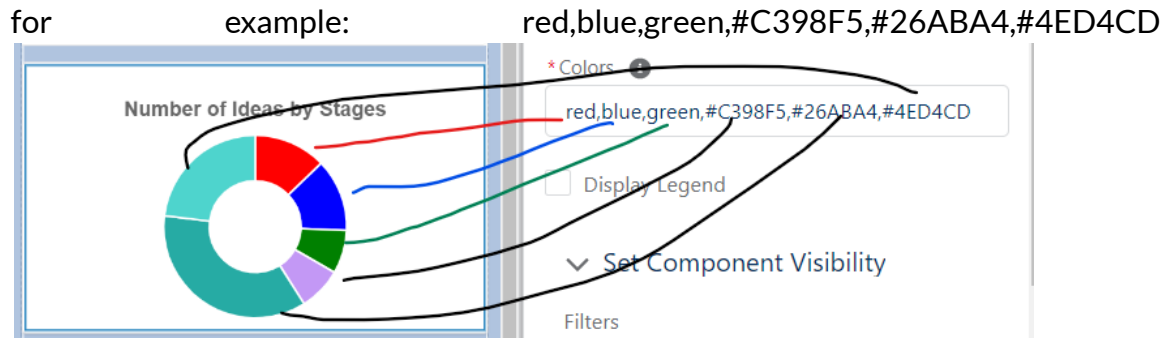
- doughnut



- Title - text field. This property defines the displaying title of the graph.
- Name for X-axis - text field, defines the title of the horizontal axis.
- Name for Y-axis - text field, defines the title of the vertical axis.

NOTE It is not recommended to fill the X-, Y-axis names for pie and doughnut types

- Label - text field, defines the label when hovering the chart
- Max Items Number - number field, defines the maximum number of displayed grouping values (categories, statuses, etc.)
- Colours - required text field, defines the colours of the segments on the graph separated by a comma. The values could be in text or HEX format.



- Display Legend - checkbox field, default - FALSE, defines if the legend of the graph should be displayed or not.

Reports and Dashboards Sharing

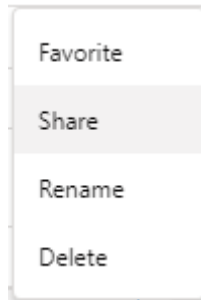
To share the Ideas Reports folder with Public Groups, Roles or Users, follow these steps:

- Navigate to the Reports tab
- Select All Folders listed on the left-hand side
- Find the Ideas Reports folder by scrolling or "Search all folders" in the top

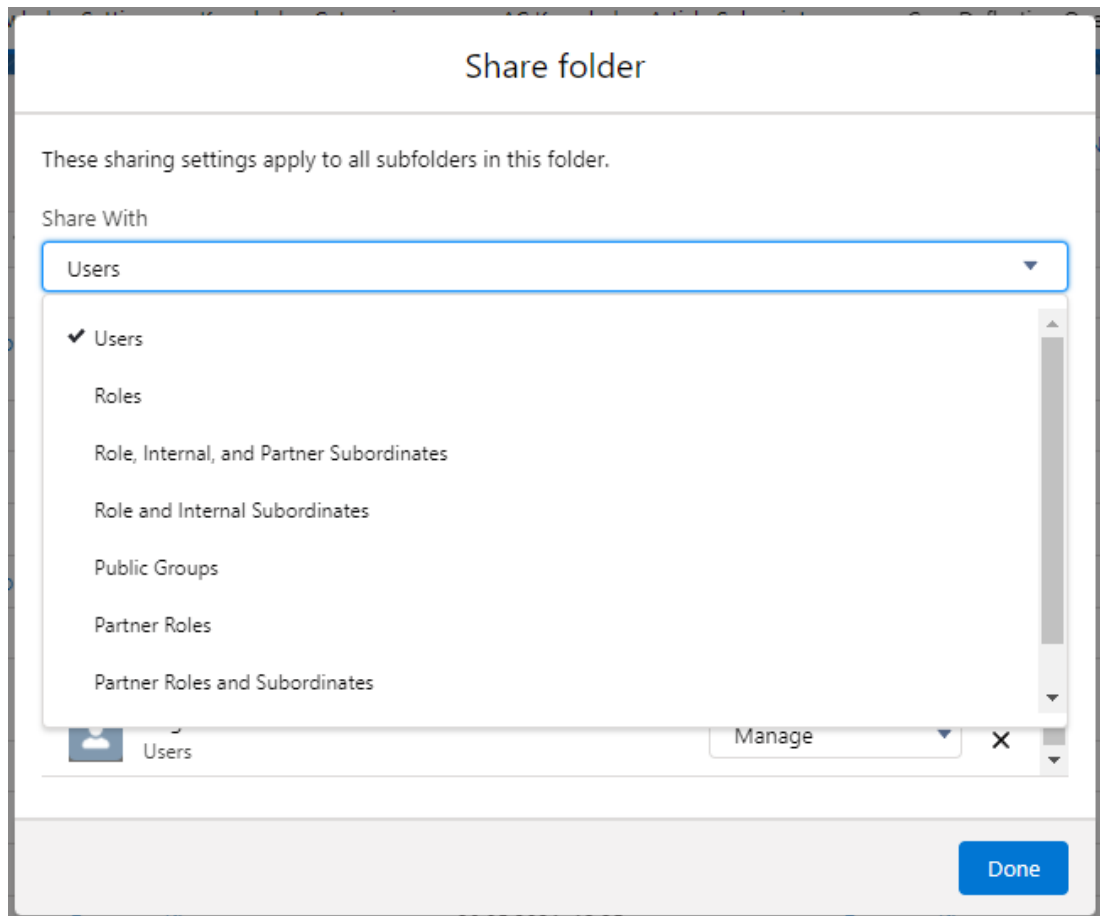
Reports						
All Folders						
16 items						
REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date	
Recent	Campaign Dashboards	Dagmara Khasueva	30.05.2021, 13:25	Dagmara Khasueva	30.05.2021, 13:25	
Created by Me	Dashboard	Dagmara Khasueva	30.05.2021, 13:25	Dagmara Khasueva	30.05.2021, 13:25	
Private Reports	Dashboard Reports - Adoption	Dagmara Khasueva	30.05.2021, 13:25	Dagmara Khasueva	30.05.2021, 13:25	
Public Reports	Data Quality Reports	Dagmara Khasueva	30.05.2021, 13:25	Dagmara Khasueva	30.05.2021, 13:25	
All Reports	Docs Tab Management Dashboard	Dagmara Khasueva	30.05.2021, 13:25	Dagmara Khasueva	30.05.2021, 13:25	
FOLDERS	Events reports	Dagmara Khasueva	10.09.2021, 11:09	Dagmara Khasueva	10.09.2021, 11:09	
All Folders	Ideas Reports	Dagmara Khasueva	04.08.2021, 14:09	Dagmara Khasueva	04.08.2021, 14:09	
Created by Me	Lead Dashboard Folder	Dagmara Khasueva	30.05.2021, 13:25	Dagmara Khasueva	30.05.2021, 13:25	
	Sales KPI Dashboard	Dagmara Khasueva	30.05.2021, 13:25	Dagmara Khasueva	30.05.2021, 13:25	

- Click the carrot on the far right of the row with your report folder

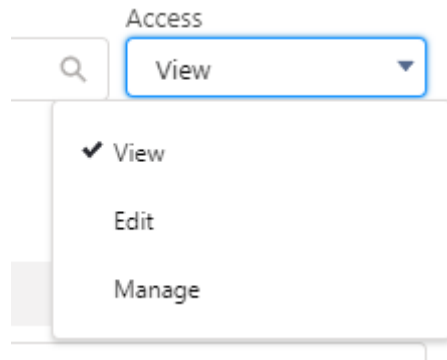
- Select Share from the dropdown



- In the new popup window, Share with Public Groups, Roles, Users



- Define access



- Click Share, and then Done

Notifications

You can set up sending notifications for subscribers and assign moderators using categories and statuses of ideas.

Update email templates for Ideas Ultimate in the organization

Go to the Organization Setup - Classic Email Templates - AC Ideas Ultimate folder.

Update the following email templates for subscribers:

- IdeaFlagNotification
- IdeaMergeNotification
- IdeaOfficialAnswerChangeToSubscriber
- IdeaStatusChangeToModerator
- IdeaStatusChangeToSubscriber
- NewIdeaNotificationToCategoryModerator

Open the template and edit HTML Version. The Text Version can be copied from the HTML one.

Replace the example.com/support in the template body with the community URL.



SETUP

Classic Email Templates

Available Merge Fields

Select Field Type

Contact Fields

Select Field

Copy and paste the merge field value into your HTML content below.

Save

Preview

Cancel

HTML Email Content

Subject

{authorName} has commented on the idea

HTML Body

```

<p>{authorName} has added a new comment to the idea - <a href="https://example.com/support/s/idea/{ideaid}">{ideaTitle}</a>.</p>
<hr />
<p>The comment says:</p>
{commentBody}
<hr />
<p>
<a href="https://example.com/support/s/ideas-unsubscribe?action=unsubscribe&ideaid={ideaid}">Unsubscribe</a> from this idea
<br />
<a href="https://example.com/support/s/ideas-unsubscribe?action=unsubscribeall">Unsubscribe</a> from all ideas
</p>

```

Community users will be able to unsubscribe from a specific idea or from all ideas at once when getting an email notification.

[Unsubscribe from this idea](#)
[Unsubscribe from all ideas](#)

After clicking one of the links, the user will be redirected to the community page.

SEARCH




YURIJ_EC...




IDEAS LIST

IDEAS UNSUBSCRIBE

Ideas unsubscribe

Configuration

Configure Email templates in Setup – Search Find box – Classic Email Templates.

For single community

If you are using a single community configured email template that comes with the package.

- Select a template – click Edit HTML Version button – HTML Body field.
- **Replace** the example.com/support in each email template with your community URL to provide correct links in the email notifications that lead to your community.

SavePreviewCancel

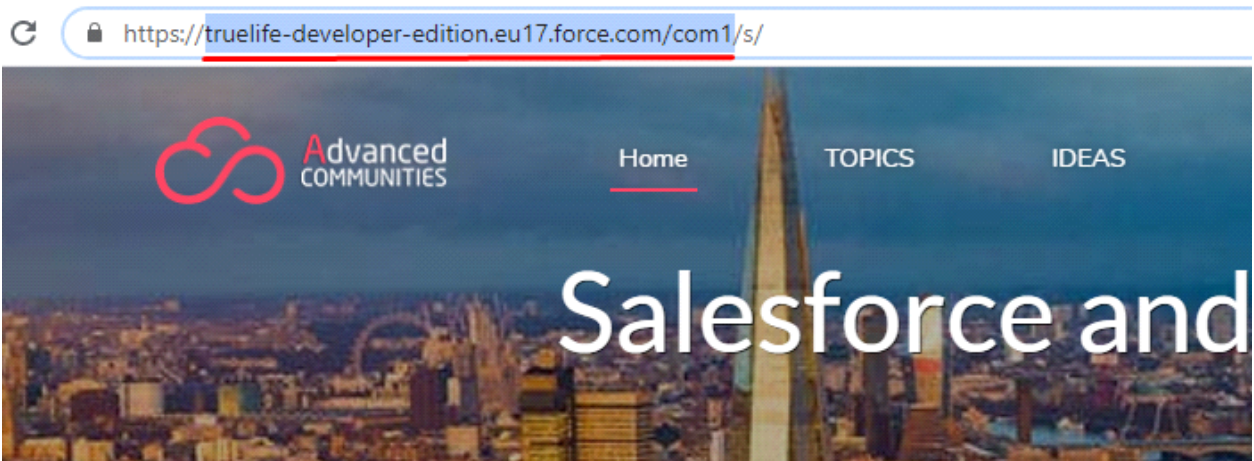
HTML Email Content

Subject

{!ideaTitle} has changed official answer

HTML Body

<p>{!ideaTitle} has changed official answer.</p>
{!officialAnswer}<hr /><p>The idea says:</p>{!ideaBody}<hr /><p>Unsubscribe from this idea
Unsubscribe from all ideas</p>|



- click Save.

For multiple communities:

- Enable the “Enable notifications for multiple communities” checkbox in the Ideas Settings - General Settings.
- Clone the prebuilt Ideas Ultimate email template for each community.

Select a template – click on its Name - click the “Clone” button.

- **Add** the name of the community before the template name separated by a double underscore.
- Click Save.

Example: **COMMUNITY NAME_ EMAIL TEMPLATE NAME**

Custom Email Template
New Template

Select the appropriate folder and enter the name and description for the email template below. Note that the Description field is for internal use only.
Once you have completed the HTML email template check the "Available For Use" box to make this template available to your users.

Email Template Edit		Save	Save & New	Cancel
Email Template Information				
Folder	AC Ideas Ultimate			
Available For Use	☒			
Email Template Name	FirstCommunity_IdeaOfficial			
Template Unique Name	FirstCommunityIdeaOfficialA i			
Encoding	Unicode (UTF-8)			
Description	Notification about official answer field change to idea subscribers			
		Save	Save & New	Cancel

- **Replace** the example.com/support in each email template with your community URL to provide correct links in the email notifications that lead to your community.

When you change the Email Template, you have to use the variables closed in curly braces “{}”.

Otherwise you can configure prebuilt emails for internal users notifications with the links that lead to your org.

Set a common sender for emails

You need to set up Organization-Wide email in Setup → Organization-Wide Email Addresses and then put the created email address in the Organization-Wide Email Address field in Ideas Settings → Common Settings → Notifications.

If an Organization-Wide Email Address is empty then the system will use a comment author as a sender.

Translations

All components' labels have corresponding instances in Custom Labels. Use them to add translations for different languages.

Running Apex Tests

Requirements:

- Set a role for the user which was used to run tests

Note: *Some custom validation rules on Idea, Account, Contact, User may cause problems with running Apex Tests.*

Get In Touch

AC Ideas Ultimate is created and maintained by **AdvancedCommunities.com** – the Experience Cloud experts.

We specialize in Experience Cloud customization, development and consulting.

Feel free to contact us regarding anything related to Experience Cloud.

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